

# Estate Planning Checklist

## Important Identification Numbers

- ☐ Social Security number and tax identification number (if you own a business)
- ☐ Driver's license number
- ☐ Birth certificate/adoption papers
- ☐ Passport number

## Personal Documents/Contact (and where they are located)

- ☐ Name and contact for Power of Attorney and person who serves as your executor
- ☐ Will, Power of Attorney/Healthcare Power of Attorney - provide signed originals to the people you have named
- ☐ Marriage license and certificate
- ☐ Divorce/separation papers
- ☐ Tax Records for current and past year
- ☐ Copy of gift tax returns filed over the last three years
- ☐ Appraisals for valuables such as jewelry, coins, paintings, and musical instruments
- ☐ Diplomas
- ☐ Real Estate Deeds
- ☐ All Doctors and contact information
- ☐ Dentist and contact information
- ☐ Lawyer contact information
- ☐ Church contact information
- ☐ Funeral Home contact information

## Business Paperwork

- ☐ Insurance papers of all kinds: property, healthcare, disability, life, vehicle, etc.
- ☐ Outstanding loans or loans payable to you AND outstanding charitable pledges
- ☐ List of monthly obligations and method of payment
- ☐ Credit cards
- ☐ Investment records
- ☐ Inventory of personal property and locations
- ☐ Make, model and VIN number of each vehicle

## Family and Friends

- ☐ Names and addresses of all family members
- ☐ Names and addresses of close friends to be contacted for medical emergency or time of death

## Employment

- ☐ Names and addresses of your employer/supervisors

## Safe Deposit Box

- ☐ Include a statement of what is stored in the safe deposit box
- ☐ Give physical address of the bank
- ☐ Provide a number and location of the key

*Note: In some states, access to safe deposit boxes is restricted after your death except by an attorney of record. Confirm with the bank that the box would not be temporarily sealed by the back or tax authorities following your death. If access is restricted, keep the original documents in a fireproof safe at home. Consider having your executor(s) designed as a signer on your safe deposit box. Your executor(s) should have a key and know the location of the box. Check with the bank and your attorney.*