25 Estate Documents
You Need to Put in One Place*

The Essentials
• Will
• Letter of Instruction
• Trust Documents
• Financial Power of Attorney (POA)

Marriage and Divorce
• Marriage License
• Divorce Papers
• Military Documents (DD214)

Health-Care Confidential
• Personals and Family Medical History
• Durable Health-Care Power of Attorney
• Authorization to Release Health-Care Information
• Living Will
• Do-Not-Resuscitate Order

Proof of Ownership
• Housing, Land and Cemetery Deeds
• Escrow Mortgage Accounts
• Proof of Loans Made and Debts Owed
• Vehicle Titles
• Stock Certificates, Savings Bonds and Brokerage Accounts
• Partnership and Corporate Operating Agreements
• Tax Returns

Life Insurance and Retirement
• Life-Insurance Policies
• Individual Retirement Accounts
• 401(k) Accounts
• Pension Documents
• Annuity Contracts

Bank Accounts/Social Media
• List of Bank Accounts
• List of all User Names and Passwords
• List of Safe-Deposit Boxes

*From Saabira Chaudhuri’s 7/2/2011 article in the Wall Street Journal