The following is a generalized list of documents and information needed to administer an estate.

PERSONAL DOCUMENTS

- ☐ Birth Certificates
- ☐ Adoption Papers
- ☐ Citizenship/Naturalization Papers
- ☐ Military Discharge Papers
- ☐ Last Will and Testament
- ☐ Trust Documents
- ☐ Burial Instructions (pre-paid services, plots, etc.)
- ☐ Safe Deposit Boxes and/or Safes (with keys and/or combinations)
- ☐ Powers of Attorney

FINANCIAL ACCOUNTS

- ☐ Bank/Credit Union Accounts (Checking, Savings)
- ☐ Retirement Accounts
- ☐ Brokerage Accounts
- ☐ Pension System Statements
- ☐ Deferred Compensation Papers
- ☐ Credit Card Accounts
- ☐ U.S. Savings Bonds
- ☐ Money Market Accounts
- ☐ Certificates of Deposit (CDs)
- ☐ Stock Certificates/Bonds

FINANCIAL PAPERS

- ☐ Real Estate Deeds
- ☐ Mortgage Documents
- ☐ Property Tax Records
- ☐ Inventory of Assets (include appraisal)
- ☐ Vehicle Titles
- ☐ Income Tax Returns for Several Years
- ☐ Rental/Lease Agreements
- ☐ Partnership Agreements
- ☐ Outstanding Loans (either owed to you or by you)
- ☐ Pending Legal Actions/Lawsuits

MEDICAL AND INSURANCE INFORMATION

- ☐ Health Care Provider and Personal ID Number
- ☐ Organ Donor Information
- ☐ Living Will/Health Care Proxy
- ☐ Long Term Care Policy Information
- ☐ Life Insurance Policy Documents
- ☐ Veterans Administration Insurance Policy
- ☐ Mortgage Insurance Policy
- ☐ Property and Casualty Policies

ONLINE ACCOUNTS

- ☐ List of all online accounts – websites/passwords

Have questions? We're here to help.
Please don't hesitate to reach out to your Relationship Manager for assistance or call us at 888-873-2640.