

ESTATE PLANNING SUPPORTING DOCUMENTS CHECKLIST

Document	Who needs this?	Do You Have it?	Where is It located?	Document	Who needs this?	Do You Have It?	Where is it located?
Wills (& codicils, if any)	P	_____	_____	Insurance Policies Life	I	_____	_____
Trust Agreements (and amendments, if any)	O, T	_____	_____	Home	O	_____	_____
Funeral Instructions		_____	_____	Health	I, O	_____	_____
Birth Certificate		_____	_____	Long Term Care	I	_____	_____
Self	S, Y	_____	_____	Lease Agreements	P	_____	_____
Spouse	I	_____	_____	Stock Certificates	P	_____	_____
Surviving Children	S, Y	_____	_____	Bond Certificates	P	_____	_____
Children from an earlier marriage	P, S, Y	_____	_____	Business Agreements	P	_____	_____
Adoption Papers	P, S	_____	_____	Annuity Contracts	P	_____	_____
Marriage Certificate		_____	_____	Bankbooks	P	_____	_____
Current	P, S, Y	_____	_____	Bank Statements (most recent)	P	_____	_____
Previous	P	_____	_____	Stock Brokerage, Mutual Fund and Other Investment Statements (most recent)	O, P, T	_____	_____
Divorce Decree	P, S	_____	_____	Mortgage Agreements	O, P	_____	_____
Change of Name	P	_____	_____	Loan Agreements / Promissory Notes	O, P	_____	_____
Naturalization Papers	P	_____	_____	Income Tax Returns (most recent)	T	_____	_____
Social Security Card	I, S	_____	_____	Booklets on Employment Benefits	I	_____	_____
Military Service	Y	_____	_____	Retirement Plan Summary	O	_____	_____
Papers		_____	_____	Gift Tax Returns (for any year filed)	T	_____	_____
VA Claim Number	V	_____	_____	Any forms designating beneficiary of life insurance or retirement accounts or plans	I, O	_____	_____
Car Registration, Title Certificate	O, P	_____	_____				
Property Deeds	O, P	_____	_____				
Real Property Tax Assessment Notices or Bills	O	_____	_____				

Explanation of How Papers are Used:
 I - Insurance Claim S - Social Security Claim
 O - Ownership change T - Tax Authorities
 P - Probate Y - Veterans Claim