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



SFC Estate Coaching

[www.sfcestatecoaching.com](http://www.sfcestatecoaching.com)

[info@sfcestatecoaching.com](mailto:cmellendorf@sfcestatecoaching.com)

PO Box 63 Thiensville WI 53092

414-885-4587

**Proof of Ownership**

* Housing, Land & Cemetery Deeds
* Escrow Mortgage Accounts
* Proof of Loans Made & Debts Owed
* Vehicle Titles
* Stock Certificates, Savings Bonds & 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 Box(es)

\*From Saabira Chauduri’s 7/2/2011 article

in the *Wall Street Journal*