

## **PERSONAL ESTATE PLANNING**

Important Information and Document Checklist



Your Name:	 
Your Address: _	 

If you need help completing this checklist, please let us know. You should also consult your attorney and/or certified public accountant regarding any legal and tax matters and documentation.

ı	Important Contacts Name			Phone Numbe	
	Financial Professional				
	CPA/Accountant				
	Insurance Agent				
	Attorney				
	Executor of Estate				
	Power of Attorney				
	Emergency papers and	l/or Information	Location		
	General Items				
	Birth Certificate				
	Social Security Card				
	Passport/Citizenship (r	aturalization papers)			
	Driver's License numbe	er and expiration date			
	Adoption papers				
	Marriage certificate				
	Pre-nuptial agreement				
	Divorce or separation	papers			
	Safe deposit box(es) ar	nd keys			
	Safe and combination				
	Investment Document	s			
	Brokerage account stat	tements			
	Mutual fund account s	tatements			
	Annuity account stater	nents			
	Individual retirement p	lan statements			
	Company retirement p	lan statements			
	Other company benefits (e.g. deferred compensation)				
	Stock certificates not h	eld in an account			
	Bearer bonds not held	in an account			
	Alternative investment	documents (including K-1s)			
	Investment club docun	nents/records			
	529 college savings pla	n statements			
	On-line securities acce	ss information			
	Beneficiary Forms for I	RAs, 401 (k)s, or other benefits plans			
	Documents showing co	ost basis of securities owned or sold			



		WEALIN ADVISORS
<b>~</b>	Emergency papers and/or Information	Location
	Insurance Documents	
	Mortgage insurance policy	
	Travel insurance policy	
	Property and casualty policy documents	
	Veterans Administration insurance papers	
	Beneficiary forms for insurance or annuity policies	
	Long term care insurance policy	
	Personal Financial Documents	
	Appraisals for valuable items	
	Inventory of valuable items	
	Buy/sell or partnership agreements	
	Deferred compensation agreements	
	Federal/state gift-tax returns	
	Prior years' tax returns	
	Motor vehicle title and/or registration papers	
	Lawsuit or documents on pending legal actions	
	Promissory notes	
	Outstanding loans	
	Mortgage documents	
	Medical bills/record, prescription plan card	
	Property and school tax records	
	Real Estate deeds and/or other titles of ownership	
	Rental and/or lease agreements	
	Trust documents/agreements	
	Bank/Credit Documents	
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards and account statements	
	Life insurance policy documents	
	Emergency Documents	
	Living Will/Health Care Power of Attorney	
	Durable Power of Attorney	
	Miscellaneous Information	
	HSA	



<b>✓</b>	Paperwork for Final Arrangements	Location	
	Last Will and Testament		
	Military discharge papers		
	Veterans receive a small stipend toward bu		
	Burial instructions		
	Cemetery plot deed		
	Pre-paid cremation documents		
	Funeral home preference and information		
	Charitable donations preference(s)		
	Letter of instruction (if available) from the		
	executor		
	Death certificate		
	The number of accounts or titles of owners	hip of the	
	deceased.	, ,	
	Phone number/address of County Fiduciary		
	The county court or clerk's office where the		
	resided will oversee estate matters and pro		
	executor must obtain a sufficient number o		
	certificates for transferring ownership of ac		
	etc.	m./biograph.	
	Information for obituaries (resume/life sto		
	Family Tree	Relationship	Location/Contact Information
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