Middlebury College

25 Estate Documents You Need to Have Ready

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

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

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

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 & Corporate Operating Agreements
• Tax Returns

Life Insurance & 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 & Passwords
• List of Safe-Deposit Boxes

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