

## 25 DOCUMENTS YOU NEED TO PUT IN ONE PLACE

### **THE ESSENTIALS**

- Will
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney (POA)
- Marriage License
- Divorce Papers
- Military Documents(DD214)

### **PROOF OF OWNERSHIP**

- Housing, Land & Cemetery Deeds
- Proof of Loans Made & Debts Owed
- Stock Certifications, Savings Bonds & Brokerage Accounts
- Partnership & Corporate Operating Agreements
- Escrow Mortgage Accounts
- Vehicle Titles
- Tax Returns

### **LIFE-INSURANCE POLICIES**

- Individual Retirement Accounts
- Annuity Contracts
- Pension Documents
- 401K Accounts

### **BANK ACCOUNTS/SOCIAL MEDIA**

- List of all User Names & Passwords
- List of Safe-Deposit Boxes
- List of Bank Accounts

### **HEALTH-CARE CONFIDENTIAL**

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