Soroptimist International of the Americas

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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