

To Assemble IMPORTANT DOCUMENTS



1 WHERE TO LOOK

Some people are highly organized and leave explicit instructions while others don't. Generally, it is best to start in an office, filing cabinet or where a computer or desk is. If your loved one worked with an estate planner, there may be a leather-bound binder with information. Other times people file important documents in boxes in an attic, closet, storage unit, a safe or safe deposit box at the bank.

For electronic files, start looking on a computer hard drive or an online document repository like [Dropbox](#) for digital copies of important documents. And don't forget to look in obscure places like the freezer or under a mattress - you'll never know what you might find.

2 DOCUMENTS TO LOCATE

The list might seem long, it is only to help uncover anything of value and make it as easy and fast as possible to do the estate settlement process. We can help you every step of the way with organizing files in our secure document repository or by helping you manage paperwork in a safe location.

3 ASSEMBLE

Don't worry if you don't have everything. Just start with whatever you can find. Sometimes it is helpful to organize them into the following categories:

1. **General / Personal**
2. **Financial**
3. **Property: Real Estate**
4. **Property: Personal**
5. **Online**

If your loved one used an online estate organization program or document repository, gather an inventory of those files.



INVENTORY:

- Will, Trust and other legal documents
- Pre-paid or pre-planned funeral directives
- Birth and marriage certificates
- Social Security card
- Driver's License
- Car title and registration
- Other vehicle title and registration (camper, boat, RV, motorcycle, second car)
- Home mortgage or Deed information
- Insurance Policy information (life, medical/health, property, long-term care, annuities, key person)
- Stock or Bond certificates, information
- Retirement plans 401(k), pension, etc.
- Financial account information, including checking, savings and investment account statements (ideally 12 months)
- Credit card or other membership statements
- Jewelry or art appraisals
- Prior tax returns, including property taxes and business tax returns
- Legacy letters or pre-written obituaries
- Military Service Records
- Business agreements or Articles of Incorporation, etc.
- Address book or paper calendar with important information



A GUIDING LIGHT WHEN YOU NEED IT MOST

608-867-7870