

## The Essential Documents That You Will Need

### Identification & Citizenship Documents:

- \_\_\_\_\_ Birth Certificate
- \_\_\_\_\_ U.S. Social Security Card
- \_\_\_\_\_ Passport
- \_\_\_\_\_ Report of Birth Abroad of US Citizen (FS-240)
- \_\_\_\_\_ Naturalization Documents (Form N-550 or N-560)

### Asset Legacy Documents:

- \_\_\_\_\_ Will
- \_\_\_\_\_ Letter of Instruction
- \_\_\_\_\_ Trust Documents
- \_\_\_\_\_ Durable Power of Attorney

### Benefit Qualification Documents:

- \_\_\_\_\_ Military discharge or retirement papers (Member Copy DD-214)
- \_\_\_\_\_ Veterans Affairs Disability Award Letter (if applicable, blue paper copy)
- \_\_\_\_\_ Copy of Medicare Card

### Proof of Asset/Debt Ownership:

- \_\_\_\_\_ Housing, land and cemetery deeds
- \_\_\_\_\_ Escrow mortgage accounts
- \_\_\_\_\_ Proof of loans made and debts owned
- \_\_\_\_\_ Vehicle Titles (include cars, trucks, boats, RV's, etc)
- \_\_\_\_\_ Stock certificates, savings bonds and brokerage accounts
- \_\_\_\_\_ Partnership and corporate operating agreements

### Bank Accounts:

- \_\_\_\_\_ List of bank accounts
- \_\_\_\_\_ List of all user names and passwords
- \_\_\_\_\_ List of safe deposit boxes and keys that are labeled
- \_\_\_\_\_ List of Trust bank accounts

### Health Care Confidential

- \_\_\_\_\_ Personal and family medical history

- \_\_\_\_\_ Medical Insurance policies
- \_\_\_\_\_ Medicare information
- \_\_\_\_\_ Primary Care Doctor's information (phone, address, care facility/hospital)
- \_\_\_\_\_ List of other current doctors' information
- \_\_\_\_\_ Dental Provider/s (might be more than one)
- \_\_\_\_\_ Eye care provider/s (might be more than one)
- \_\_\_\_\_ Durable health-care power of attorney
- \_\_\_\_\_ Authorization to release health-care information (HIPPA Release Form)
- \_\_\_\_\_ Living Will
- \_\_\_\_\_ Advanced Directive or Do Not Resuscitate Order (if requested)
- \_\_\_\_\_ Organ Donation (If requested)

Life Insurance and Retirement:

- \_\_\_\_\_ Life-insurance policies
- \_\_\_\_\_ Individual retirement accounts
- \_\_\_\_\_ 401 (k) accounts, IRA, ROTH IRA
- \_\_\_\_\_ Pension documents
- \_\_\_\_\_ Annuity contracts

Marriage and Divorce:

- \_\_\_\_\_ All Marriage licenses (even if they are not still married)
- \_\_\_\_\_ All Divorce Decrees and related Orders/Minute Entry's  
(even if they are remarried)
- \_\_\_\_\_ Death Certificate of spouse (include divorcees of )

Family Contact Information:

- \_\_\_\_\_ Correct spelling of all names
- \_\_\_\_\_ Correct spelling of mother's maiden name and father's names
- \_\_\_\_\_ Correct place of birth
- \_\_\_\_\_ Correct date of birth
- \_\_\_\_\_ Surviving (step)siblings with phone numbers and current addresses
- \_\_\_\_\_ List of family, friends and businesses to notify at time of death with correct phone numbers and addresses

Anything else that is specific to your family.