

## ***ESTATE CHECKLIST***

**GOAL:** To help you and your spouse, significant other, executor or friend know what documents/information you have and their location. After both of you fill out this form, you should know what information you need to share.

-If an item doesn't apply to you, write "N/A" in all 4 columns for that item.

-If you have an item, check the box under "Yes" column.

-If you know the "location" of that item, write it in the 2<sup>nd</sup> column; if not, leave blank.

-If you know what "action" needs to be taken write it in the 3<sup>rd</sup> column. If no action is needed, write "none" in that column.

Use the extra blank lines for listing items specific to your situation.

After you have gone through the list and marked the appropriate boxes for each item, work on filling in the boxes that are blank and complete any "actions" in that column. Put a check in the last box after an item is completed. You might want to keep your completed form for future reference.

<b>DOCUMENTS/INFORMATION RELATED TO THE FOLLOWING</b>	<b>YES</b>	<b>LOCATION</b>	<b>ACTION</b>	<b>✓</b>
Will/Trust/Powers of Attorney				
Organ donation wishes				
Funeral/memorial instructions				
Cemetery plot/columbarium				
Safe deposit box				
Safe deposit box key				
Safe deposit box – list of contents				
Personal address/phone book				
Passwords/computer, cell, router				
Long term care policy				
Insurance - Accident				
Insurance - Auto				
Insurance - Disability				
Insurance - Health				
Insurance - House				
Insurance - Life				
Insurance - Mortgage				
Insurance – Through credit cards				
Insurance – Travel/auto				
Lifestar type (helicopter) membership				
Birth certificate				
Passport				
Social Security card				
Real estate/deeds/leases				
Marriage certificate/Prenuptial				

[illegible]

