

6. Location of life, health and property insurance policies; also burial insurance and a notation if it was prepaid. Do you own a cemetery plot? Where are those papers located?
7. Location of papers for pension or retirement plans and individual annuities.
8. Location of membership certificates in unions, lodges or fraternal organizations which provide death or cemetery benefits.
9. List of personal and real property you own.
10. Location of signed original and copies of list or separate writing of how you want your personal property and family heirlooms distributed after your death.
11. Location of income tax returns and supporting records.
12. Location of all credit cards and a list of the account numbers, addresses and phone numbers of the companies.
13. Location of any trust funds which you have set up or in which you are named, and the names of trustees and copy of the trust fund agreement.
14. Names and addresses of advisors such as your lawyer, your banker, insurance representatives, broker, CPA, or tax advisor.
15. Your father's full name and mother's maiden name, which will be needed for the death certificate.

16. Instructions and directions concerning your business.
17. A statement of reasons for actions taken in your will, such as disinheritance.

Knowing where these items are located will make it easier and less stressful for your family to settle your estate when you are gone. The grief experienced by surviving relatives only becomes more difficult to manage when important information, some of which is needed almost immediately, is misplaced. Providing instant access to a document may prove vital to insure that certain, essential instructions are carried out as planned.

References

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