



The
SAINT YVES
—LAW FIRM—

www.SaintYvesLaw.com

Estate Plan Checklist

INSTRUCTIONS

Fill out the form below, indicating the various places where you keep your documents.


Please remember to specify the location of each document by writing it on the provided line next to the item as you check it off.




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Estate Plan Checklist

Full Name: _____

Last Will & Testament (*Location*): _____

Advance Medical Directive (*Location*): _____

Health Insurance Information: _____

Maryland MOLST (Do Not Resuscitate) Form: _____

Power Of Attorney (*Location*): _____

Life Insurance Policy (*Location*): _____

Birth Certificate (*Location*): _____

Marriage License / Divorce Decree (*Location*): _____



Estate Plan Checklist

Loan Documents (Location): _____

Automobile Titles (Location): _____

Property Deeds (Location): _____

Copies Of Keys To Cars, Safe Deposit Boxes, etc. (Location): _____

Burial Plans & Final Preparations

(Note: After death, the family should obtain copies of death certificate - up to 10 copies):

Funeral Home Information: _____

Burial / Cremation Instructions: _____

Memorial Service / Funeral Wishes: _____

Obituary Ideas / Draft: _____



Estate Plan Checklist

○ Financial Accounts

(Note: Make sure to include in your estate plan folder recent statements and documents for all items listed below.):

- Health Insurance Policy
- Checking / Savings Accounts
- Credit Cards
- List of Regular Bills Paid (Utility, Phone, Cable, Internet, Cell Phone, Water / Sewage, Car, etc.)
- On-line Automatic Bill Payments w/ Date of Withdrawal
- Investment Accounts (401k, IRA, etc.)
- Stocks & Bond Certificates
- Employer / Retirement Benefit (Pension) Plans
- Veterans' Benefit Records
- Disability Payment Documents
- Income Statements (Social Security, Employment, etc.)
- Loan Papers
- Tax Returns
- Documents For Tax Returns (Property Tax Records, Bank 1099's, etc.)

○ Household / Property / Possessions Documents

(Note: Make sure to include in your estate plan folder recent statements and documents for all items listed below.):

- Health Insurance Policy
- Deed & Abstract For Home
- Mortgage Paperwork
- Title Insurance Policy
- Rental Property Documents
- Other Records:
- Name & Contract For Storage Unit
- List Of Valuable Possessions & Location
- Auto Ownership Records
- Auto Insurance Policy



Estate Plan Checklist

○ Insurance Policies

(Note: Make sure to include in your estate plan folder recent statements and documents for all items listed below.):

- Health Insurance Policy
- Long Term Health Insurance Policy
- Other Death Benefits
- Life Insurance Policy
- Homeowners' Or Renters' Insurance Policy
- Home & Valuable Possessions Inventory
- Property / Casualty / Flood Insurance Policy
- Vehicle Insurance Policy (Auto, Boat, Camper, etc.)

○ Legal Information

(Note: Make sure to include in your estate plan folder recent documents for all items listed below.):

- Birth Certificates
- Adoption Records
- Business Ownership Documents
- Driver's License (Copy)
- Employment Information
- Marriage Certificate
- Military Service Papers (Including Discharge Papers)
- Names & Contact Details (Lawyers, Accountants, Financial Advisors)
- Passport, Citizenship, Immigration Registration Papers
- Social Security Cards (Copy)

○ Usernames & Passwords

(Note: Including security questions and answers if applicable.):

- Bank Accounts
- Cell Phone(s)
- Credit Card Accounts
- Email Accounts
- On-line Bill Payments
- Portals For All Health Care (Hospital, Doctors' Offices, etc.)
- Social Media Accounts

