

Legacy Planning: Document Locator

One of the greatest gifts we can give to our loved ones is an easily settled estate. Empower your kids by helping them find the documents they need to successfully settle your estate during a difficult time. Filling out this table and giving it to them could turn a marathon of frustration into a sprint of accomplishment. Take an afternoon and simply mark the location of each of these important estate documents.

Document	Location of Originals
Wills	
Living trust	
Medical Power of Attorney	
General Power of Attorney	
Durable Power of Attorney	
Health care directive	
Advanced Care Directive (ie POLST)	
Life insurance policy 1	
Life insurance policy 2	
Charitable trust	
Family foundation documents	
Custodial accounts	
LLC documents	
Deeds to real property	
Marriage license	
Birth certificates of all	
Prenuptials	
Automobile titles	
Burial instructions	
Citizenship papers	
Guardian papers	
Organ donation papers	
Domestic partner papers	
Veterans benefit papers	
Divorce decree	
Adoption papers	
Letters to kids	
Instructions for executors	
Password file	
Other	
Other	

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