**Essential Documentation for My Heirs**

**Date of completion/edited \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Physical location where a copy of this form is found. Consider giving heirs a copy.

|  |
| --- |
|  |

Social Security number and birth date (both if married or partners), children.

|  |  |  |
| --- | --- | --- |
|  |  |  |

If a veteran—service number and where discharge form DD 214 can be found. Dates served, branch.

|  |
| --- |
|  |

Location of Estate documents: Will, Trust, POA health and financial. Estate attorney, etc.

|  |
| --- |
|  |

**ASSETS:**

Passwords, User ID /email address: Computer, Tablet, etc.; Bank; Brokerage; Utilities; Insurance

 (Keep beneficiaries up to date). STORE THESE IN A SAFE SECURE PLACE—indicate where stored.

|  |
| --- |
|  |

Real Estate and where deeds are located (Include address and Tax Parcel Number)

Automobiles, where Titles are located

|  |
| --- |
|  |

Jewelry, art, etc. and location of items, Special Bequests (include photos)

|  |
| --- |
|  |

Other assets

|  |
| --- |
|  |

**LIABILITIES:**

Credit cards with contact information

|  |
| --- |
|  |

Mortgage--with contact information

|  |
| --- |
|  |

Other debt—with contact information, account information

|  |
| --- |
|  |

**OTHER INFORMATION:**

Insurance: Life, Health, Vehicle, Long-term Care (Keep beneficiaries up to date) and contact information.

|  |
| --- |
|  |

List how bills are paid—List those paid via credit card, automatic checking account, etc.

|  |
| --- |
|  |

Where stored: Prior year’s income tax filing. Who prepared and filed the forms. Keep last 3 years returns.

|  |
| --- |
|  |

Explain the quality of life you find imperative, or, when to pull the plug. List prepaid or preferred funeral arrangements, your choice of funeral service, what is to be done with your body. Write your Obituary.

|  |
| --- |
|  |

Schedule a meeting with your heirs. Explain this document, its location and purpose.

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_