

# 25 Estate Documents You Need to Put in One Place

## The Essentials

- Will
- Letter of Introduction
- Trust Documents
- Financial Power of Attorney (POA)

## Marriage & Divorce

- Marriage License
- Divorce Papers
- Military Documents (DD214)

## Health Care Confidential

- Personal and Family Medical History
- Durable Health Care Power of Attorney
- Authorization to Release Health Care Information
- Do-Not-Resuscitate Order

## Bank Accounts & Social Media

- List of Bank Accounts
- List of all User Names and Passwords
- List of Safe Deposit Boxes

## Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds and Brokerage Accounts
- Partnership and Corporate Operating Agreements
- Tax Returns

## Life Insurance & Retirement

- Life Insurance Policies
- Individual Retirement Accounts
- 401(k) Accounts
- Pension Documents
- Annuity Contracts

For more information on Estate Planning visit [www.utdallas.plannedgiving.org](http://www.utdallas.plannedgiving.org) or call (972) 883-6023

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