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Estate Planning Checklist

The passing of a family member can be devastating, made no easier with the financial and legal requirements to follow. We hope this list will help make this time of grief easier on you and your family.

Records to gather and review:

- Will or Trust documents
- Insurance policies
- Credit card account numbers and statements
- Mortgage and Loan statements
- Household budget documents (utility and service bills to be paid)
- Retirement account statements (IRAs, 401(k)s, pension plans)
- Nonretirement account statements (brokerage, mutual fund, annuities, etc.)
- Bank statements (checking and savings accounts)
- Property deeds, titles, and documentation
- Marriage certificate
- Divorce or child support documents
- Social Security numbers
- Birth certificates of minor children
- Accessible list of websites, logins and passwords for financial information