

VITAL DOCUMENTS & KEYS

Documents

- Will
- Living Trust Documents
- Deed(s) of Trust
- List of Property Owned (if more than one home)
- List of Asset Accounts
 - Bank Accounts
 - Credit Card Accounts
 - Investment Accounts
- Car Title(s)
- Contact List
 - Family Members
 - Doctors
 - Caretakers
 - Neighbors
 - Attorney(s)
 - Accountant
 - Insurance Broker(s)
 - Veterinarian
 - Other Emergency Contacts
- Online Log-In Information & Websites
- Pet Care
- List of Insurance Policies & Policy Numbers
 - Homeowners Insurance Policy
 - Car Insurance Policy
 - Life Insurance Policy
 - Long-Term Care Insurance Policy
 - Durable Power of Attorney
 - Durable Financial Power of Attorney
 - Health Care Proxy
 - Health Care Directive/Living Will
 - Burial Plans/Funeral Arrangements

Keys

- Home/Property Keys
- Car Keys
- Safe Deposit Keys
- Safe (or Combination)

Location of Keys:

Location of Documents:

This complimentary list from CHS shows an example of many of the documents that are part of a comprehensive estate plan. Be sure to consult with an attorney who specializes in estate planning as every situation, like every family, is unique.