

CLIENT CHECKLIST



WHAT YOUR EXECUTOR* NEEDS TO KNOW

Having your financial information organized in an accessible way is crucial to help your executor do the work of settling your estate: taking inventory to send out notifications, making any distributions, filing your final taxes and paying off debts. It's a big job that can require months of work. Use this checklist to make that work easier.

IMPORTANT DOCUMENTS

Will	Personal loan notes, payable or receivable
Trust and estate plan documents, such as irrevocable trusts	Insurance policies or cards (life insurance, long-term care, auto, home)
Health care directive/living will/health care power of attorney	Death certificate
Instructions to access any safe deposit box or safe	Deeds/titles to property (home, car, boat, burial plots, etc.)
Bank statements	Divorce decree
Birth certificate	Marriage certificate and prenuptial/marital agreements
Retirement benefit statements (pension, profit-sharing, 401(k), IRA, group insurance, annuities)	Military discharge
Tax returns	Citizenship papers
Business documents such as LLC partnership agreements or stock certificates	Property tax records
	Social Security records
	Vehicle titles

IMPORTANT PERSONAL INFORMATION

Names and contact information of closest immediate family, friends and beneficiaries, as well as extended family (including ex-spouses) and colleagues	Username and passwords for personal online accounts (including email and social media accounts)
Names and contact information of all lawyers, accountants, doctors, insurance agents and other professional service providers	Passwords to access computers, cell phones and other electronic devices
	Inventory of safe deposit box or safe

*Includes executors, trustees or any other fiduciaries named to act on your behalf and in your best interests.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

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