

Legacy Documents to Keep Together

PROOF OF PURCHASE

- Deed to Your Home(s), Land, and/or Burial Plots
- Statement from Mortgage Account(s) in Escrow
- Proof of Outstanding Loans or Debts Owed to You
- Titles of Vehicles
- Account Numbers and/or Custodian Info for Bonds, Stocks, and Brokerage Accounts
- Partnership Agreements or Business Incorporation Documents
- Copy of Recent Tax Returns
- Life Insurance Policy Information

MEDICAL

- Personal and Family Medical History
- Durable Power of Attorney for Healthcare Document
- Authorization to Release Medical Information
- Do Not Resuscitate Order
- Living Will

FINANCIAL

- List of Bank Accounts (With Usernames and Passwords)
- Location of Safe(s) and/or Safety Deposit Box(es)
- Durable Power of Attorney for Financial Decisions

RETIREMENT

- IRA Documentation
- Pension Documentation
- 401K/403B Documentation
- Annuity Documentation

LEGAL

- Birth Certificates
- Marriage License
- Divorce Decree

TESTAMENTARY

- Will
- Letter of Instruction
- Trust Documentation
- Legacy Letter(s)

PASSWORDS

- Social Media Accounts
- Online Credit Card Access
- Streaming Subscriptions