MassMutual

Estate Plan Inventory Guide

Complete the Estate Plan Inventory Guide in Two Easy Steps

Coping with the death of a loved one is a trying and emotional time. By purchasing a life insurance policy from Massachusetts Mutual Life Insurance Company (MassMutual), you've already taken the first step in protecting the ones you love financially. You can also help your loved ones through this process by having your financial documentation in good order.

This inventory guide will help you organize your important documents and provide your loved ones a reference for locating them in the future. This guide should be kept in a safe and convenient location. A copy may also be provided to your trusted advisor for safekeeping. Review this information annually and update as circumstances change.

Step 1: List Important Locations and People

Create an itemized list of the various locations of your important policies, documents, and advisors.

EXAMPLE

A. Residence

Address: *1234 Park Street*

Springfield, MA 01111

Locations (e.g., filing cabinet, safe):

1) *Safe behind picture in living room*
2) *Filing cabinet in office*
3) *Lock box in utility closet*
4) *Thumb drive in desk*

Note that the address is listed first, with sub-locations listed below. If all of your important documents and policies are not located in one spot within your residence, be sure to specify exact locations.

EXAMPLE

C. Safe Deposit Box (address, location and box number)

Address: *Bank of America (Phone #)*

285 Huntington Ave. Boston, MA 02115

Location of key: *In safe in living room*

This lists a Safe Deposit Box along with the phone number, the address, and the key location.

The information provided is not written or intended as specific tax or legal advice. MassMutual, its subsidiaries, employees, and representatives are not authorized to give tax or legal advice. Individuals are encouraged to seek advice from their own tax or legal counsel. Individuals involved in the estate planning process should work with an estate planning team, including their own personal legal or tax counsel.

A. Residence

Address: ____

____

____

Locations (e.g., filing cabinet, safe):

1) ____

2) ____

3) ____

B. Office

Address: ____

____

____

Locations (e.g., filing cabinet, safe, desk):

1) ____

2) ____

3) ____

C. Safe Deposit Box (address, location, and box number)

Address: ____

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____

Location of key: ____

D. Attorney(s) (name(s), address(es), and phone number(s)

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E. CPA/Tax Advisor(s) (name(s), address(es), and phone number(s)

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F. Other (name(s), address(es), and phone number(s)

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Digital Assets List

Creating a digital assets list may sound simple enough, but can have repercussions if provided casually. You should work with your personal tax and/or legal advisors to provide the proper guidance needed specifically for your fiduciary or other designated person(s) to access the content of your digital assets.

In a document separate from your estate planning documents, list your digital assets, access information, recipient (if any), and your wishes for each asset. Alternatively you might consider online password management software. Make sure you provide directions so your executor or other designated party can access that software.

Step 2: Complete Document Location Key

Use the preceding location identifiers to indicate the location of the following applicable documents, using the location's corresponding letter and sub-location number.

EXAMPLE

	Original	Copy
Legal Documents		
Last Will and Testament	C	A2

C indicates that the original document can be found in the safe deposit box and A2 indicates that a copy is at your residence in location 2, filing cabinet in office. (see sample locations in Step 1).

	Original	Copy
Legal Documents		
Last Will and Testament		
Tax Returns		
Marriage Certificate		
Citizenship Papers		
Birth Certificate(s)		
Spouse's Will		
Military Discharge Papers		
Trust Agreements		
Power(s) of Attorney		
Children Custodial/Adoption Papers		
Divorce/Separation Papers		
Cemetery Plot Deed		
Insurance Policies		
Life Insurance		
Final Expense Insurance		
Disability Insurance		
Homeowners		
Automobile(s)		
Health/Medical/LTC		
Investments		
Brokerage Accounts		
Mutual Funds		
Stock Certificates		
Bonds		
Additional Securities		
Investment Records		
Collectibles		
Appraisals (Real Estate, Art, Jewelry, Antiques, Collectibles)		

	Original	Copy
Business Papers		
Buy-Sell Agreements		
Cross Purchase Agreements		
Split Dollar Arrangements		
Employment Contracts		
Misc. ______________________		
Retirement		
Pension Plan		
401(k)		
IRA		
Keogh Plan		
Annuity Contract		
Social Security		
Deferred Comp		
Real Estate/Property/Debt		
Home Deed		
Second Property Deed		
Rental Property Deed		
Mortgage(s)		
List of Credit Cards		
Loans/Notes		
Banking Information		
Checking Account(s)		
Savings Account(s)		
Certificates of Deposit		
Account Statements		
Miscellaneous		
Burial Instructions		
Special Bequests		
Safe Keys/Combinations		
Various Memberships		
Digital Assets List		

Participating whole life insurance policies are issued by Massachusetts Mutual Life Insurance Company (MassMutual), Springfield, MA 01111-0001.