

# Documents you may need to settle the estate

## LEGAL AND PERSONAL DOCUMENTS

- Address book
- Birth certificate
- Cemetery plot deed
- Child custody/adoption papers
- Citizenship papers
- Death certificate
- Divorce/separation papers
- Driver's license
- Last will and testament
- Marriage certificate
- Organ donation card
- Passport
- Tax returns
- Trust agreements

## INSURANCE POLICIES

- Automobile
- Disability
- Health
- Homeowner's
- Life
- Long-term care
- Medical

## INVESTMENT DOCUMENTS

- Additional securities
- Appraisals of valuables
- Bonds
- Brokerage accounts
- Collectibles
- Investment records
- Mutual funds
- Stock certificates

## BUSINESS PAPERS

- Buy/sell agreements
- Cross-purchase agreements
- Employment contracts
- Split-dollar arrangements

## REAL ESTATE/PROPERTY/DEBT

- Credit cards
- Home deed
- Other property deeds (second home/rental property)
- Loans

## RETIREMENT PAPERS

- 401(k)
- Annuity contract
- IRA
- Keogh plan
- Pension plan
- Social Security

## BANKING INFORMATION

- Account statements
- Certificates of deposit (CDs)
- Checking and savings account numbers
- Safe deposit box

## MISCELLANEOUS

- Burial instructions
- Membership papers
- Safe deposit box key
- Safe keys/combination
- Special bequests



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