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
- Trust and estate plan documents, such as irrevocable trusts
- Health care directive/living will/health care power of attorney
- Instructions to access any safe deposit box or safe
- Bank statements
- Birth certificate
- Retirement benefit statements (pension, profit-sharing, 401(k), IRA, group insurance, annuities)
- Tax returns
- Business documents such as LLC partnership agreements or stock certificates

- Personal loan notes, payable or receivable
- Insurance policies or cards (life insurance, long-term care, auto, home)
- Death certificate
- Deeds/titles to property (home, car, boat, burial plots, etc.)
- Divorce decree
- Marriage certificate and prenuptial/marital agreements
- Military discharge
- Citizenship papers
- 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
- Names and contact information of all lawyers, accountants, doctors, insurance agents and other professional service providers

- Usernames and passwords for personal online accounts (including email and social media accounts)
- 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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