

You should locate the following documents and information:

Estate Planning documents:

1. Will, Trusts, Powers of Attorney signed by Trustor.
2. Deeds or other documents transferring property to Trust.

Life insurance policies owned by Trustor.

Retirement plans (including not only plans provided by current and former employers but also IRAs and self-employed retirement plans).

Business agreements involving Trustor and business books and records.

Uniform Donor Card authorizing anatomical gifts.

Final instructions left by Trustor. A list of final instructions can tell where documents and records are located, what property the Trustor owns, what funeral arrangements the Trustor wants, and other information that may be needed.

Birth certificate for Trustor.

Military discharge papers of Trustor.

Marriage license.

Prenuptial agreement.

Divorce papers.

Birth certificates and adoption papers for Trustor's children.

Deeds to property owned or coowned by Trustor.

Vehicle registrations for Trustor's vehicles.

Bank books, certificates of deposit and other evidence of ownership of

accounts.

Stock certificates and other evidence of ownership of stocks and bonds.

Recent tax returns and W-2 forms.

Loan documents including mortgage.

Other insurance policies, including health, property and travel/accident insurance.

Membership benefit statements for all clubs, including auto club, and organizations to which Trustor belonged.

Credit card benefit information.

Citizenship papers.

Appraisals of property.

Social Security card.