

Estate Information

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| <input type="checkbox"/> Wills and codicils | <input type="checkbox"/> Preplanned funeral arrangements |
| <input type="checkbox"/> Trust documents | <input type="checkbox"/> Medical benefits records |
| <input type="checkbox"/> Social security records | <input type="checkbox"/> Boat and recreation vehicle records |
| <input type="checkbox"/> Pension records | <input type="checkbox"/> Motorcycle, plane, etc. records |
| <input type="checkbox"/> Employment records | <input type="checkbox"/> Internet accounts |
| <input type="checkbox"/> Employment benefit plans | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Life insurance policies | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Death benefit records | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Bank account deposit books | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Bank statements | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Cancelled checks | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Stock and bond certificates | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Annuities | |
| <input type="checkbox"/> Investment records | Notes: |
| <input type="checkbox"/> State and federal tax returns | |
| <input type="checkbox"/> Other financial papers | |
| <input type="checkbox"/> Deeds and property records | |
| <input type="checkbox"/> Loans receivable | |
| <input type="checkbox"/> Loans payable | |
| <input type="checkbox"/> Property tax records | |
| <input type="checkbox"/> Leases | |
| <input type="checkbox"/> Rental receipts | |
| <input type="checkbox"/> Property sales records | |
| <input type="checkbox"/> Property insurance records | |
| <input type="checkbox"/> Vehicle ownership certificates | |
| <input type="checkbox"/> Vehicle purchase agreements | |
| <input type="checkbox"/> Property inventories | |
| <input type="checkbox"/> Appraisal reports | |
| <input type="checkbox"/> Purchase records | |
| <input type="checkbox"/> Storage agreements | |
| <input type="checkbox"/> Marriage certificate | |
| <input type="checkbox"/> Birth certificates | |
| <input type="checkbox"/> Military service records | |
| <input type="checkbox"/> Citizenship papers | |
| <input type="checkbox"/> Court papers | |
| <input type="checkbox"/> Inheritance records | |
| <input type="checkbox"/> Contracts and agreements | |
| <input type="checkbox"/> Business records | |
| <input type="checkbox"/> Trustee, guardian, executor records | |
| <input type="checkbox"/> Membership information | |
| <input type="checkbox"/> Copyrights and patents | |
| <input type="checkbox"/> Subscriptions | |
| <input type="checkbox"/> Utility bills | |

Non-Probate Property and Powers

- Joint tenancies
 - Real Property
 - Vehicles
 - Bank Accounts
 - Stocks and bonds
- Community property held in joint tenancy
- Community property with right of survivorship
- Life Estates
- U.S. Savings bonds
- Life insurance
- Annuities
- IRA or Keogh Plans
- Retirement benefits
- Deferred compensation benefits
- Employment benefits
- Workers' Compensation benefits
- Veterans' benefits
- Social Security benefits
- Trusts
- Pay on Death accounts
- Totten trusts
- Securities