



Creating an Estate Planning Binder

Overview

Now that you have completed the important task of getting your estate plan in order, it is a good time to ensure your documents and financial and medical information are organized so that your loved ones can easily locate and access this information both during your life and at your death. Below is a recommended approach to organizing your documents.

Create a binder with the following three sections. Update this binder regularly as your life circumstances change.

Service members protected

- ◇ Your Will (or location of your original)
- ◇ Your Personal Property Memorandum (or the location of original if not with Will)
- ◇ Copy of Medical and Financial Powers of Attorney (noting location of original)
- ◇ Letters of instruction (for example a list of persons or organizations to notify of your death)
- ◇ Funeral contracts or instructions
- ◇ Location of a thumb drive or other place where passwords to emails and accounts are stored

Financial Documents

- ◇ Copies of Real Estate Deeds and Transfer on Death Deeds
- ◇ Copies of Vehicle Titles and their beneficiary designations, if any
- ◇ Copies of beneficiary designations for your financial accounts and life insurance
- ◇ List of financial institutions where you maintain accounts (banks, brokerages, creditors)
- ◇ List of insurance companies for life, home/ auto, annuities, long term care, etc.
- ◇ List of utilities (phone, internet, cable/ satellite, electric, gas, streaming services) you deal with on a regular basis

Medical Documents

- ◇ Copy of your Advanced Medical Directive
- ◇ Medical Power of Attorney (and in loco parentis for kids)
- ◇ Financial Power of Attorney
- ◇ A list of medications (frequencies and doses)
- ◇ Copies front and back of insurance cards
- ◇ Copy front and back of driver's license or other picture ID card
- ◇ List of allergies
- ◇ List of doctors, pharmacies (with addresses, phones and fax numbers)
- ◇ List of emergency contacts
- ◇ Dates of important medical events/ procedures/surgeries
- ◇ Extra blank pages for you to take notes, etc.

The material in this handout represents general legal advice. It is always best to consult an attorney about your legal rights and responsibilities regarding your particular case.