



Document Portfolio Checklist

All of the following documents or items should be included in your Document Portfolio if you want to be sure your estate is handled exactly as you wish.

1. Copy of Will
2. Copy of Trust(s)
3. Copy of Durable Power of Attorney
4. Copy of Medical Power of Attorney
5. Copy of Living Will
6. Copy of Declaration of Disposition of Last Remains
7. Copies of insurance policies
8. List of professional advisors
9. List of location of original documents
10. Funeral and burial arrangements
11. Instructions to personal representative
12. Recent payment schedule for your social security
13. Inventory of your assets with locations of titles

Other valuable information to include:

(We have included these forms and several others on this Plan & Prosper CD)

1. What to do when someone dies.
2. Suggestions for your estate planning letter.
3. How to execute various estate documents.
4. Blank forms for trust amendments and codicils for wills.