

A POWERFUL TOOL FOR STREAMLINED ESTATE PLANNING

# Estate Plan Directory

Creating an Estate Plan Directory provides invaluable peace of mind and ensures that your loved ones can navigate your estate efficiently and effectively when the time comes.

## Benefits of an Estate Plan Directory



Secure, centralized information



Streamline Executor's tasks



Ensure that nothing is overlooked



Reduce family stress

## Communicate & Stay Current



Communicate with your executor and family where and how to access your important documents. Regular updates and reviews are essential to keep the information current and relevant.

## Items that may go into your Estate Plan Directory

### LEGAL

Copies of your will, trust documents, powers of attorney, and health care directives.



### FINANCIAL

List of bank accounts, investment accounts, company pension documents, tax files, and safe deposit boxes.

### INSURANCE

Details of life, health, home and car insurance policies.



### REAL ESTATE

Deeds, mortgage information, and property tax records for properties owned.

### DEBTS

List of outstanding debts, loans, and credit cards.



### FUNERAL

Arrangements for your funeral, burial or cremation and any specific wishes.



### Key Contacts

Include names and contact information of key professional individuals.

- lawyer
- financial advisor
- accountant
- executor



### Digital Assets

Instructions for accessing online accounts and digital assets ensuring they are not lost or overlooked.



### Safe Storage

Store your important documents in a safe place and make sure to tell your loved ones and your executor where they can find them.

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