

GET YOUR HOUSE IN ORDER

Important Document Organization Checklist

- ☐ Existing wills, trusts and amendments
- ☐ Financial and healthcare powers of attorney
- ☐ Advance healthcare directive and medical contacts
- ☐ Property deeds, titles and mortgage information
- ☐ Bank and credit union account inventory
- ☐ Retirement, investment and pension records
- ☐ Life insurance policies and beneficiary details
- ☐ Debts, recurring bills and key household accounts
- ☐ Personal representatives and trusted contact list
- ☐ Digital asset access instructions (stored securely)
- ☐ Funeral or final arrangement preferences
- ☐ Location of original documents and safe storage

Do not write passwords, full account numbers, or sensitive data on this checklist.

For education only. Consult qualified professionals for advice specific to your circumstances.