

## COVID-19 Social Distancing Estate Planning Scavenger Hunt Checklist

Estate Planning Legal Documents	Retirement Plans
☐ Revocable Living Trust and/or Irrevocable Trust	☐ Pension Plan
☐ Last Will and Testament	☐ Profit Sharing Plan/401(k)/403(b)
☐ Affidavit/Certification of Trust	☐ SIMPLE IRA
☐ Special Gift Memorandum	☐ IRA
☐ General Durable Power of Attorney	
☐ Health Care Treatment Directive	<b>Securities</b>
☐ Anatomical Gift Declaration	
☐ Assignment of Tangible Personal Property	☐ Investment Securities
☐ Cemetery Plot Deed	☐ Brokerage Account
☐ Memorial Instructions	☐ Stock Certificates
	☐ Bonds (paper and digital)
Personal Effects and Other Assets	☐ Annuity Contracts
	☐ Stock-Option Plan
Car Titles	
☐ Boat/Plane Titles	Business Papers
Tenancy Agreement or Community Property Agreement	☐ Employment Contracts
List of "Digital Assets,"	☐ Partnership Agreements
☐ "Digital Asset" User Names and Passwords	☐ LLC/Corporation Documents
List of Insurance Policies	Leases
☐ Marriage Certificate	☐ Bills of Sale
☐ Divorce/Separation Papers	<b>D</b> ins of State
☐ Birth Certificates	Cash
☐ Passports/Citizenship Papers	Casii
☐ Military Papers ☐ List of Friends	☐ Checkbooks
☐ List of Friends ☐ List of Relatives	☐ Savings Passbook
☐ List of Relatives ☐ List of Advisors	☐ Credit Cards
List of Advisors	$\square$ CDs
D - 1 E-4-4-	☐ Banks Statements
Real Estate	☐ Canceled Checks
☐ Deeds to Real Estate	
☐ Title Insurance	Tax Records
☐ Rental Property Records	☐ Income Tax Returns
☐ Notes & Loan Agreements	
☐ Mortgages	☐ Gift Tax Returns
	☐ Estate Tax Return (deceased spouse)