

Your Plan
DESIGNED

COVID-19 Social Distancing Estate Planning Scavenger Hunt Checklist

Estate Planning Legal Documents

- Revocable Living Trust and/or Irrevocable Trust
- Last Will and Testament
- Affidavit/Certification of Trust
- Special Gift Memorandum
- General Durable Power of Attorney
- Health Care Treatment Directive
- Anatomical Gift Declaration
- Assignment of Tangible Personal Property
- Cemetery Plot Deed
- Memorial Instructions

Personal Effects and Other Assets

- Car Titles
- Boat/Plane Titles
- Tenancy Agreement or Community Property Agreement
- List of "Digital Assets,"
- "Digital Asset" User Names and Passwords
- List of Insurance Policies
- Marriage Certificate
- Divorce/Separation Papers
- Birth Certificates
- Passports/Citizenship Papers
- Military Papers
- List of Friends
- List of Relatives
- List of Advisors

Real Estate

- Deeds to Real Estate
- Title Insurance
- Rental Property Records
- Notes & Loan Agreements
- Mortgages

Retirement Plans

- Pension Plan
- Profit Sharing Plan/401(k)/403(b)
- SIMPLE IRA
- IRA

Securities

- Investment Securities
- Brokerage Account
- Stock Certificates
- Bonds (paper and digital)
- Annuity Contracts
- Stock-Option Plan

Business Papers

- Employment Contracts
- Partnership Agreements
- LLC/Corporation Documents
- Leases
- Bills of Sale

Cash

- Checkbooks
- Savings Passbook
- Credit Cards
- CDs
- Banks Statements
- Canceled Checks

Tax Records

- Income Tax Returns
- Gift Tax Returns
- Estate Tax Return (deceased spouse)

