

# IMPORTANT DOCUMENT CHECKLIST: WHAT TO GATHER BEFORE OR AFTER

This list is a good guide both for preparing your estate, and for navigating it after you're gone.

## Estate Planning & Legal Documents

- Last Will and Testament
- Trust Documents
- Letters of Administration or Probate Court Documents
- Power of Attorney Documents
- Prenuptial or Postnuptial Agreements
- Business Ownership Agreements

## Banking & Cash Accounts

- Bank Account Statements (Checking & Savings)
- Safe Deposit Box Information
- Online Banking Login Credentials (if legally accessible)


## Investments & Retirement Accounts

- Investment Portfolios (Stocks, Bonds, Mutual Funds)
- Retirement Account Statements (401(k), IRA, Pensions, Annuities)
- Stock Certificates or Brokerage Statements

## Real Estate & Property Records

- Property Deeds
- Mortgage Documents
- Home Equity Loan or Line of Credit Documents
- Property Tax Records
- Rental or Lease Agreements

**Pro tip:** Ensure all collected documents are stored securely and are accessible to authorized individuals involved in the estate settlement process.

 (720) 255-3595

 [sellpopsplace@gmail.com](mailto:sellpopsplace@gmail.com)

 [www.sellpopsplace.com](http://www.sellpopsplace.com)

## Insurance Policies

- Life Insurance Policies
- Homeowners & Property Insurance Policies
- Auto Insurance Policies
- Health & Long-Term Care Insurance Policies

## Debts & Liabilities

- Credit Card Statements
- Outstanding Loan Documents (Personal, Auto, Student Loans, etc.)
- Medical Bills

## Taxes & Government Benefits

- Recent Tax Returns (Last 3-5 Years)
- Social Security Records + Social Security Number
- Medicare/Medicaid Documents
- Veterans' Benefits Information (if applicable) + Military Discharge Papers
- Veterans' Administration Claim Number

## Business & Employment Documents (If Applicable)

- Business Financial Statements & Tax Returns
- Ownership Agreements (LLC, Corporation, Partnership)
- Employee Benefits & Pension Information


## Digital Assets & Online Accounts

- Passwords for Financial Accounts (if legally accessible) Pro tip: there are companies that specialize in recovering unknown passwords. Contact us for information,
- Cryptocurrency Wallet Keys
- List of Subscription Services & Automatic Payments

## Miscellaneous Important Documents

- Funeral & Burial Prepayment Plans
- List of Trusted Advisors (Attorneys, Financial Planners, Accountants, Insurance Agents)
- Safe or Lockbox Combinations
- Automotive Registration
- Marriage & Death Certificate

**Pro tip: Ensure all collected documents are stored securely and are accessible to authorized individuals involved in the estate settlement process.**

 (720) 255-3595

 [sellpopsplace@gmail.com](mailto:sellpopsplace@gmail.com)

 [www.sellpopsplace.com](http://www.sellpopsplace.com)

  
ESTATE SETTLEMENT, SIMPLIFIED