

Jill Miller & Associates, P.C.
61 Broadway, Suite 2125
New York, New York 10006
(212) 601-2425, www.mtrustlaw.com

ESTATE PLAN ORGANIZER

Now that your estate plan is complete, we recommend that you compile the following information in a safe place so that your family will have easy access to all of your important papers in the event of an emergency. In times of crisis there is often confusion and anxiety, having all of your important papers organized and in one place will enable your family to act quickly and without uncertainty. Because safe deposit boxes are often sealed at death, we recommend that you keep your funeral arrangements, health care proxy, power of attorney, living will and wills **somewhere more accessible.**

In general, we recommend that you organize your personal papers accordingly:

Documents within Fire Proof or Safe Deposit Box:

1. Original Bond and Stock Certificates
2. Original Birth Certificates
3. Original Marriage Certificates
4. Original Citizenship Papers
5. Original Adoption Papers
6. Original Divorce Decrees
7. Original Death Certificates
8. Original Deeds
9. Original Titles to Automobiles
10. Veteran's Papers
11. Original Contracts

Documents within Personal Filing Cabinet:

1. Income Tax Returns and Working Papers
2. Insurance Policies
2. Copies of Will(s)
3. Original Health Care Proxy, Power of Attorney, Living Will, Organ Donor Declaration
4. Current Bank and Brokerage Statements
5. Employment Records and Benefit Information
6. Unpaid Bills
7. Paid Bill Receipts
8. Health Insurance Information and Family Health Records
9. Credit Card Information
10. Education Information & College Savings Plan Information
11. Inventory of Safe Deposit Box (and key)
12. Loan Statements
13. Loan Payment Books
14. Copies of all documents stored in safe deposit box, including, but not limited to: birth certificates, death certificates, stock and bond certificates, marriage certificates, divorce decrees and deeds

IMPORTANT CONTACTS

We recommend that you complete this page of your organizer, and distribute it to those individuals who would need it in the event of a family crisis. The following people are important persons that are involved with your personal affairs. Many questions often arise in the event of a crisis and having the contact information for your advisors and agents in one document will make communications with them much easier for your family.

Important Contacts:

<i>Contact</i>	<i>Name</i>	<i>Address</i>	<i>Phone</i>	<i>Notes</i>
Attorney(s)				
Financial Advisor(s)				
Children's School Contact				
Physician				
Insurance Agent				
Accountant				
Guardian of your children				
Executor(s) of your will				
Co-Signer of your Safe Deposit Box				

Burial Information

Your Burial Instructions: _____

Cemetery Plot Deed Location: _____

Location of your Will: _____

Important Confidential Personal Information

Please make sure that this page is kept in a very safe place, and that someone knows of its location.

Item	Number/Password/Details
Social Security Number	
Passport Number/Driver's License Number	
Location of letter to family members on reason for appointment of a particular guardian	

Safe Deposit Box, Safe or Fireproof Box

Safe Deposit box location:

Key location/other person who knows location or has a key:

Safe or fire proof box location:

Combination/key:

Description of contents within safe deposit box/safe/fire proof box:

Financial Accounts

Bank #1 name and Web address:

Username & password:

ATM/debit card PIN:

Bank #2 name and Web address:

Username & password:

ATM/debit card PIN:

Banking

<u>Institution</u>	<u>Branch Location</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
Checking					
Savings					

Electronic device access

<u>Device</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Computer				
Laptop				
Tablet				
Cell Phone				
DVR/TiVO				
Television				
Other				

Investment accounts

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>

Retirement Accounts

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
				<p style="text-align: center;"><i>Account #</i></p> <p style="text-align: center;"><i>Security Question answer</i> =</p> <p style="text-align: center;"><i>Balance as of _____:\$</i></p>

Insurance

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
<i>Health</i>				
<i>Life</i>				
<i>Car</i>				
<i>Homeowner</i>				
<i>Other</i>				

Credit Cards

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
American Express				
Visa				
Mastercard				
Other				

Debts

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
Mortgage				
Home equity Line of Credit				
Cars				
Student Loan				
Other				

Utilities

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
Electric				
Gas				
Internet				
Phone (landline)				
Phone (cell)				

TV				
Trash				
Water				
Other				

Online accounts

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
Amazon				
Ebay				
Airlines				
Apple				
PayPal				
Other				

Social Media

<u>Institution</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Other information</u>
Facebook				
LinkedIn				
Youtube				
Twitter				
Skype				
Instagram				
Other				

Please update this list if you decide to change your login details or passwords to these accounts.

Email addresses

Personal e-mail address & password:

Work e-mail address & password:

Other:

Other Notes
