TOOL 3

Documents to Locate

Check what exists, note where it is, and flag anything that needs review.

DOCUMENT	FOUND?	WHERE IT IS	NEEDS REVIEW?
Revocable living trust	☐		☐
Trust amendments	☐		☐
Will	☐		☐
Durable power of attorney	☐		☐
Advance health-care directive	☐		☐
HIPAA / medical authorization	☐		☐
Current deed to home	☐		☐
Property tax records	☐		☐
Homeowners / property insurance	☐		☐
Mortgage / HELOC records	☐		☐
Recent tax returns	☐		☐
Investment / retirement statements	☐		☐
Life insurance policies	☐		☐

DOCUMENT	FOUND?	WHERE IT IS	NEEDS REVIEW?
Long-term-care insurance	☐		☐
Burial / memorial instructions	☐		☐
Marriage / divorce documents	☐		☐

ATTORNEY REVIEW NEEDED BECAUSE:

NOTES