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**ESTATE PLANNING HIDE AND SEEEK**

**ESTATE PLANNING LEGAL DOCUMENTS: SECURITIES:**

**\_\_\_\_\_**REVOCABLE LIVING TRUST AND/OR IRREVOCABLE TRUST \_\_\_\_\_INVESTMENT SECURITIES

\_\_\_\_\_LAST WILL AND TESTAMENT \_\_\_\_\_BROKERAGE ACCOUNT

\_\_\_\_\_CERTIFICATION OF TRUST \_\_\_\_\_STOCK CERTIFICATES

\_\_\_\_\_SPECIAL GIFT MEMORANDUM \_\_\_\_\_BONDS

\_\_\_\_\_DURABLE POWER OF ATTORNEY \_\_\_\_\_ANNUITY CONTRACTS

\_\_\_\_\_HEALTH CARE SURROGATE DESIGNATION \_\_\_\_\_STOCK-PLAN OPTIONS

\_\_\_\_\_ANATOMICAL GIFT DECLARATION

\_\_\_\_\_ASSIGNMENT OF TANGIBLE PROPERTY

\_\_\_\_\_CEMETERY PLOT DEED

\_\_\_\_\_MEMORIAL INSTRUCTIONS **BUSINESS PAPERS:**

 \_\_\_\_\_EMPLOYMENT CONTRACTS

 **REAL ESTATE:** \_\_\_\_PARTNERSHIP AGREEMENTS

\_\_\_\_\_DEEDS TO REAL ESTATE \_\_\_\_\_LLC/CORPORATION DOCS

\_\_\_\_\_TITLE INSURANCE \_\_\_\_\_LEASES

\_\_\_\_\_RENTAL PROPERTY RECORDS \_\_\_\_\_BILLS OF SALE

\_\_\_\_\_NOTES & LOAN AGREEMNTS

\_\_\_\_\_MORTGAGES

**PERSONAL EFFECTS AND OTHER ASSETS:**

\_\_\_\_\_CAR TITLES

\_\_\_\_\_BOAT/PLANE TITLES

\_\_\_\_\_TENANCY AGREEMENT OR COMMUNITY PROPERTY AGREEMENT

\_\_\_\_\_LIST OF DIGITAL ASSETS

\_\_\_\_\_” DIGITAL ASSETS” USERNAMES & PASSWORDS **CASH:**

\_\_\_\_\_LIST OF INSURANCE POLICIES **\_\_\_\_\_**CHECKBOOKS

\_\_\_\_\_MARRIAGE CERTIFICATE \_\_\_\_\_SAVINGS PASSBOOK

\_\_\_\_\_DIVORCE/SEPARATION PAPERS \_\_\_\_\_CREDIT CARDS

\_\_\_\_\_BIRTH CERTIFICATES \_\_\_\_\_CDs

\_\_\_\_\_PASSPORTS/CITIZENSHIP PAPERS \_\_\_\_\_BANK INVESTMENTS

\_\_\_\_\_MILITARY PAPERS \_\_\_\_\_CANCELED CHECKS

\_\_\_\_\_LIST OF FRIENDS & RELATIVES

\_\_\_\_\_LIST OF ADVISORS

 **TAX RECORDS:**

**RETIREMENT PLANS:** \_\_\_\_\_INCOME TAX RETURN

\_\_\_\_\_PENSION PLAN \_\_\_\_\_GIFT TAX RETURN

\_\_\_\_\_PROFIT SHARING PLAN/401(k)/403(b)

\_\_\_\_\_SIMPLE IRA OR IRA