

FAMILY DOCUMENTS & ESTATE

A simple checklist of the wills, beneficiaries and documents every young family needs

REVIEWED _____

This isn't about being morbid — it's about making sure the people you love are protected and know where things are.

KEEP IN A SAFE PLACE

✓ ESSENTIAL DOCUMENTS

- ☐ Last Will & Testament
- ☐ Living Will / Advance Directive
- ☐ Financial Power of Attorney
- ☐ Medical Power of Attorney
- ☐ Guardianship for children
- ☐ Life insurance policy
- ☐ Birth & marriage certificates
- ☐ Social Security cards
- ☐ Property deeds & titles
- ☐ Trust documents (if any)

FINAL-EXPENSES ESTIMATE

Funeral / Service	\$ _____
Burial / Cremation	\$ _____
Outstanding Debts	\$ _____
Legal / Probate Fees	\$ _____
▶ ESTIMATED TOTAL	\$ _____

BENEFICIARIES REVIEW

ACCOUNT / POLICY	BENEFICIARY	UPDATED
Life Insurance	_____	☐
401(k) / Pension	_____	☐
IRA / Investments	_____	☐
Bank Accounts	_____	☐
Other	_____	☐

ACCOUNT & PASSWORD LOCATIONS

ACCOUNT	WHERE IT'S KEPT
Bank / Login	_____
Investments	_____
Insurance	_____
Utilities / Bills	_____
Password Manager	_____

Who to Tell & Where It's Kept

"Getting your documents in order is one of the most loving things you can do for your family."