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Organizing Important Documents For Your Family

Estate planning documents are only effective if your executor and your family know how to access the documents and have all of the information they need to use them.

The following information should be stored in a place that is easily accessible to your family members and/or the executor of your estate. Let those individuals know where you are storing this information and your estate planning documents. Some of this information should be updated annually.

Assemble the following information in one place:

1. Your Social Security number.
2. Copies of any beneficiary designation forms from insurance policies or investments. You should update your forms if your address or the address of a beneficiary has changed. If you want to change the named beneficiary, this should be done as soon as you make this decision.
3. Contact information for your executor/executrix, attorney, accountant or other financial advisor, as applicable.
4. A list of any health and life insurance policies, with contact information and policy numbers for each.
5. A list of any sources of income, including salaries, pensions, Social Security, stock dividends, funds, annuities, trusts, interest from accounts, etc.
6. A list of your accounts at any bank as well as account information for any stocks, retirement accounts, mutual funds and any other accounts. Include the name of the financial institution or company, safety deposit box locations, if any, and the account numbers and contact information.
7. A list of any property you own, such as your home, a business, other real estate, etc.
8. A list of your outstanding debt, including loans, credit cards and mortgages. Include the name of the financial institution or company and account numbers.
9. Instructions directing where they can find important documents, including the following as applicable:

Last Will and Testament

Living Will

Health Care Power of Attorney

Deeds

Mortgage Statements

Tax Returns

Bank Statements

Credit Card Information

Loan Contracts

Investment Documents

Insurance Policies

Car and Boat Registration and Title

Safe Deposit Box Key or Safe Combination

Online Account PINs, Username and Passwords for Key Email Accounts

Your Birth Certificate

Naturalization Papers

Your Marriage Certificate

Funeral Preferences (if not already recorded in your Last Will and Testament)

I do not recommend storing your documents or information in a bank safe deposit box because this can cause extra work for your executor. Instead, store the documents in a fireproof safe and let the executor or a trusted family member know where you are storing the safe and where the keys are located.

My Services

If you have any questions about estate planning or estate administration, please do not hesitate to contact me through my online law office at www.kimbrolaw.com, by email at slk@kimbrolaw.com or by telephone: (910) 619-5530.