

Executor Information

Valuable Property	
• Real Estate	
• Vehicles	
• Retirement accounts	
• Life insurance (#s & address)	
• Bank accounts (#s & address)	
• Investments	
• Other	
Where to find Documents	
• Will	
• Deeds	
• Financial records	
• Bank statements	
• Income tax returns	
• Retirement accounts	
• Social Security records	
• Living Will	
• Property tax records	
• Marriage certificate	
• Insurance policies	
• Beneficiary designation forms	
• Investments	
• Birth certificate	
• Passport	
Where to find Other Items	
• Credit cards	
• Social Security/Medicare card	
• Address book	
• Car keys	
• House keys	
• Checkbook	
• Valuable jewelry	
Other Information	
• Social Security #	
• Doctor	
• Lawyer	
• Financial adviser	
• Investment adviser	
• Insurance agent	
• Passwords for accounts/email	
• Safe Deposit Box	