

# Estate<sup>++</sup> Quick Reference

## Important information needed for family members

- Name, Address, Phone Numbers, E mail Address
- Fluent Languages
- Blood Type
- Immunizations
- Special Needs in case of disability
- Citizenship Information
- Birth/Death Certificate location
- Religious Affiliation
- Parental Information (Names, Maiden Names, Place/Date of Birth/Death)
- Driver's License Information
- Social Security Information
- Passport/Visa Information
- Green Card Information
- Citizenship Papers description and location
- Education and Certifications
- Military Service
- Medical History including current prescriptions

## Important contact information for:

- Tax Advisor(s)
- Financial Advisor(s)
- Attorney(s)
- Executor(s)
- Trustee(s)
- Guardian(s)
- Power(s) of Attorney
- Health Care Agent(s)
- Representative Payee(s)
- Physician(s)
- Dentist(s)

## Files to upload:

- PDF versions of wills, trusts, powers of attorney, health care proxies, and citizenship papers
- PDF versions of appraisals, receipts, and cancelled checks for items requiring professional appraisal
- Image of Passport
- Image of Driver's License
- Photographs of insured property including:
  - Home exterior including any home improvements and landscaping
  - Home interior including furniture, building materials, and fixtures
  - Expensive personal property such as artwork, jewelry, and collectibles
  - Vehicles such as cars, boats, and recreational vehicles

## Documentation needed to aid data entry:

- Credit Card statements
- Loan payment statements
- Utility billing statements
- Private School contract and billing statements
- Safe Deposit Box contract and billing statements
- Post Office Box contract and billing statements
- Storage Bin contract and billing statements
- Insurance premium payment statements
- Club Membership contract and billing statements including Health Clubs and Country Clubs.
- Service contract and billing statements including At Home Care by Health Care Professionals, Lawn Care, Maid Services, Pet Care, Home Security, and Pest Control.  
Lawn Care, Maid Services, Pet Care, Home Security, and Pest Control.
- Subscription billing statements including magazines and newspapers.
- Charitable Contribution payment statements
- Child Support payment information
- Alimony payment information
- Paycheck stubs
- Bank Account statements including checking and savings accounts.
- Financial Asset statements including Mutual Fund, Stocks, Bonds, DRIPs, Money Market accounts, and Brokerage Accounts.
- Pension benefit statements
- Information on online accounts including URL, username, and password
- Social Security benefit statements
- VA benefit statements
- Award program statements including Frequent Flyer Miles, Hotel Stay Points, Rental Car Miles, or Credit Card Points.
- Child Support receipt information
- Alimony receipt information
- Personal Loan information
- Real Estate information including alarm codes, closing statements, and deeds
- Homeowner Association payment statements
- Vehicle information including title and registration.
- Personal Property information including title, registration, and purchase information.
- Legal Document location information
- Anatomical Gift information
- Nursing Home contract and billing statements
- Funeral Home contract and billing statements
- Cemetery contract and billing statements
- Place of Worship information including contribution information.
- Personal Bequest information including title, registration, and purchase information.
- Notes and Instructions including Final wishes, Final instructions, Personal memoirs, Personal goals, Personal accomplishments, Personal achievements, Personal values, Childhood memories, Family history, Genealogy and ancestry information, Recipes, Memorable letters, and Child growth charts.