

## Estate and Trust Administration Made Easy!

Written by Susan Edson

Thursday, 26 April 2012 08:44 - Last Updated Wednesday, 23 May 2012 09:22

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Would you like your name fondly remembered or not? Here's how to make the unenviable job of serving as an Executor or Trustee a bit easier.

Follow these easy steps to insure that your name will be fondly by those to whom you leave your worldly goods.

Your Estate Planning Notebook

Original of your Last Will and Testament;

Revocable Living Trust [if applicable];

Advanced Medical Directive (for healthcare decisions if you are incapacitated);

Durable Financial Power of Attorney;

Personal Property Memorandum; and

Transfer Documents (confirmation of assets transferred to your revocable trust, if applicable). Additionally, put the year end statement for your bank accounts, brokerage accounts and life insurance policies, 401(k), pension, annuity and IRA documents in your notebook.

In a Separate File or Notebook

In a separate file or notebook the existence and location of which is noted in your estate planning notebook and made known to your Executor or Trustee:

Birth Certificate;

Marriage license. Your surviving spouse is likely to need it to prove that he or she was married to the deceased before being able to claim anything based on the marriage;

Divorce papers, if applicable;

Social Security Number;

Death Certificates for significant family members;

Documentation of ownership of property, including housing, land, cemetery plots, vehicles, stocks, bonds, etc.;

Proof of loans made to others;

Debts you owe;

Location of any safe-deposit box with the location of corresponding keys;

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Tax returns for the most recent three years; and

List of user names and passwords for Internet accounts.

Providing your Executor or Trustee with well organized financial records will make the task of administering your estate or trust easier and cheaper. When your relatives think of you, they will thank you not only for the tangible financial assets you left them, but also for the intangible and thoughtful gift of organized paperwork.