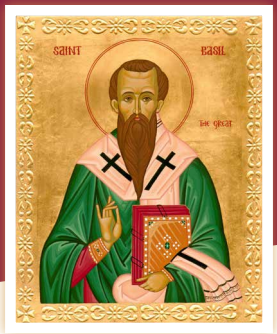
25 ESTATE DOCUMENTS YOU NEED TO PUT IN ONE PLACE



ST. BASIL SOCIETY of IOCC
International Orthodox Christian Charities

The Essentials

- Will
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney (POA)

Marriage and Divorce

- Marriage License
- Divorce Papers
- Military Documents (DD214)

Health-Care Confidential

- Personals and Family Medical History
- Durable Health Care Power of Attorney
- Authorization to Release
- Health Care Information
- Living Will
- Do-Not-Resuscitate Order

Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds and Brokerage Accounts
- Partnership and Corporate Operating Agreements
- Tax Returns

Life Insurance and Retirement

- Life Insurance Policies
- Individual Retirement Accounts
- 401(k) Accounts
- Pension Documents
- Annuity Contracts

Bank Accounts/Social Media

- List of Bank Accounts
- List of all Usernames and Passwords
- List of Safe-Deposit Boxes

This publication is intended to provide general gift planning information. Our organization is not qualified to provide specific legal, tax, or investment advice, and this publication should not be looked to or relied upon as a source for such advice. Consult with your own legal and financial advisors before making any gift.

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