



Legacy Documents to Keep Together

PROOF OF PURCHASE

- Deed to Your Home(s), Land, and/or Burial Plots
- Statement from Mortgage Account(s) in Escrow
- Proof of Outstanding Loans or Debts Owed to You
- Titles of Vehicles
- Account Numbers and/or Custodian Info for Bonds, Stocks, and Brokerage Accounts
- Partnership Agreements or Business Incorporation Documents
- Copy of Recent Tax Returns
- Life Insurance Policy Information

MEDICAL

- Personal and Family Medical History
- Durable Power of Attorney for Healthcare Document
- Authorization to Release Medical Information
- Do Not Resuscitate Order
- Living Will

FINANCIAL

- List of Bank Accounts (With Usernames and Passwords)
- Location of Safe(s) and/or Safety Deposit Box(es)
- Durable Power of Attorney for Financial Decisions

RETIREMENT

- IRA Documentation
- Pension Documentation
- 401K/403B Documentation
- Annuity Documentation

LEGAL

- Birth Certificates
- Marriage License
- Divorce Decree

TESTAMENTARY

- Will
- Letter of Instruction
- Trust Documentation
- Legacy Letter(s)

PASSWORDS

- Social Media Accounts
- Online Credit Card Access
- Streaming Subscriptions

612.440.1882 | www.apexlegacyconsultants.com | hello@apexlegacyconsultants.com

The contents of this document are not, nor are they intended to be, legal or financial advice. Information and opinions formed by GPS are for educational purposes only. Individuals seeking specific legal advice are advised to consult an attorney. Individuals seeking financial advice should consult a financial professional.