

When you're getting your estate in order, there are many accounts, policies, documents, and other information to organize—and the list of to-dos can quickly become overwhelming. But our ultimate planning checklist will help you get organized painlessly. Organizing your most important information remove a big burden on your family if anything should happen to you—and you can relax knowing that they're taken care of.

Insurance Policies

* Life Insurance
* Health Insurance
* Car Insurance
* Home Insurance
* Other Insurance policies (theft, fire, earthquake, etc.)

Bank Accounts

* Checking accounts
* Savings accounts
* Money market accounts
* Certificates of deposit (CDs)
* Debit cards
* Credit Cards
* Card number
* Expiration date

Recent account statements

* Login and password information for online account management

Mortgages Or Loans

* Company through which mortgage or loan was given
* A copy of the mortgage or loan agreement

Tax Returns

* Most recent W-2 forms or federal self-employment tax return
* Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable
* Gift tax returns

Pension Plans And Retirement Benefit Information

* 401(k) or 403(b) plans
* IRAs
* Roth IRAs
* Simplified Employee Pension (SEP) plan
* Salary Reduction Simplified Employee Pension (SARSEP) plan

Titles Or Deeds To Any Property

* Real estate
* Motor vehicles
* Boats

Investment Portfolios

* Stocks
* Bonds
* Mutual funds

Will

* Copy of the Will
* Copies of previous versions of the Will
* Name of attorney or law firm that helped create the Will, if applicable

Trusts

* Declarations of trust or Trust agreements
* Name of attorney or law firm that helped create the Trust, if applicable
* Bank accounts associated with the Trust

Power Of Attorney

* Name of the person appointed to Power Of Attorney
* Power Of Attorney documentation
* Name of attorney or law firm that helped create the POA, if applicable

Safe Deposit Box

* Location of safe deposit box
* Safe deposit box keys or location of safe deposit box keys

Any Professionals Who Have Helped

* Lawyer
* Accountant
* Insurance agent

Advance Directive

* Living Will
* Health Care Proxy
* Do Not Resuscitate (DNR)

Proof Of Identity And Relationships

* Social Security card
* Armed Forces discharge papers
* Birth certificate
* Death certificate
* Marriage certificates
* Divorce certificates
* Prenuptial agreements
* Divorce settlements

Household Utilities

* Electricity
* Gas
* Water
* Phone
* Cable
* Internet

Automatically Renewing Medications

* Names of medications
* Name of pharmacy where medications are renewed
* Name of doctor who prescribed medication

Email

* Gmail
* Hotmail
* Yahoo! Mail
* AOL

Online Businesses

* Amazon
* PayPal
* Ebay

Social Media

* Facebook
* Twitter
* LinkedIn

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