

Legal Documents

Your executor will need access to various legal documents to settle your estate.

Some of these are essential (your Will, your beneficiary designation, your Power of Attorney). Others might only be relevant in specific situations (divorce orders, prenuptial agreements, guardianship orders).

This section is a checklist of legal documents your executor should know about. For each one, note whether you have it and where it's stored.

WHY THIS MATTERS

Legal documents prove things. They prove you were divorced. They prove you have a binding agreement with your spouse. They prove you have legal authority over someone's care.

If your executor doesn't know these documents exist, they might make decisions based on incomplete information. Or they might spend weeks searching for something they need urgently.

Let's document what you have and where it is.

Your Legal Documents

A master checklist of every legal document, and where to find each one.

WILL & ESTATE DOCUMENTS

Tick what you have and note where the original is kept.

Will

Have original Have copy Don't have

STORED AT

Codicil (amendment to Will)

Have original Have copy Don't have

STORED AT

Copy of Will

Have original Have copy Don't have

STORED AT

POWER OF ATTORNEY

Durable Power of Attorney (Financial)

Have original Have copy Don't have

STORED AT

Health Care Proxy (Medical / Personal Care)

Have original Have copy Don't have

STORED AT

Your Legal Documents (cont.)

ATTORNEY'S NAME

GUARDIAN'S NAME

ADVANCE CARE PLANNING

Advance Directive (Living Will) / Living Will

Have original

Have copy

Don't have

STORED AT

Do Not Resuscitate (DNR) Order

Have original

Have copy

Don't have

STORED AT

RETIREMENT SAVINGS

Beneficiary Designation (401(k)/IRA)

Have original

Have copy

Don't have

STORED AT

WHICH RETIREMENT SAVINGS FUND

DATE NOMINATION MADE

MARRIAGE & RELATIONSHIP

Marriage Certificate(s)

Have original

Have copy

Don't have

STORED AT

Your Legal Documents (cont.)

Domestic Partnership / Cohabitation Agreement

Have original Have copy Don't have

STORED AT

Prenuptial / Financial Agreement

Have original Have copy Don't have

STORED AT

PRENUP DATE MADE

PRENUP LAWYER

DIVORCE & SEPARATION

Divorce Order / Certificate

Have original Have copy Don't have

STORED AT

Property Settlement Agreement

Have original Have copy Don't have

STORED AT

Divorce Decree / Court Orders

Have original Have copy Don't have

STORED AT

DATE OF DIVORCE

WHAT ORDERS COVER

Your Legal Documents (cont.)

CHILD-RELATED

Children's Birth Certificates

Have original Have copy Don't have

STORED AT

Guardianship Orders

Have original Have copy Don't have

STORED AT

Parenting Orders / Custody

Have original Have copy Don't have

STORED AT

Child Support Agreement

Have original Have copy Don't have

STORED AT

ADOPTION

Adoption Orders (if you were adopted)

Have original Have copy Don't have

STORED AT

Your Legal Documents (cont.)

Adoption Papers (if you adopted)

Have original Have copy Don't have

STORED AT

TRUST DOCUMENTS

Family Trust Deed

Have original Have copy Don't have

STORED AT

Self-Directed IRA / Trust Documents

Have original Have copy Don't have

STORED AT

TRUST NAME(S)

OTHER TRUST DOCUMENTS

BUSINESS LEGAL

Shareholder Agreement

Have original Have copy Don't have

STORED AT

Partnership Agreement

Have original Have copy Don't have

STORED AT

Your Legal Documents (cont.)

Buy-Sell Agreement

Have original Have copy Don't have

STORED AT

Bylaws / Articles of Incorporation

Have original Have copy Don't have

STORED AT

PROPERTY

Title Deeds

Have original Have copy Don't have

STORED AT

Mortgage Documents

Have original Have copy Don't have

STORED AT

Easements or Covenants

Have original Have copy Don't have

STORED AT

HOW MANY PROPERTIES

WHAT THEY COVER

Your Legal Documents (cont.)

IMMIGRATION & CITIZENSHIP

Citizenship Certificate

Have original	Have copy	Don't have
STORED AT		

Passport

Have original	Have copy	Don't have
STORED AT		

Visa Documents

Have original	Have copy	Don't have
STORED AT		

COURT ORDERS & OTHER

COURT ORDER TYPE

COURT

DATE

LOCATION OF DOCUMENTS

SUMMARY OF WHAT IT COVERS

OTHER DOCUMENT & LOCATION

Your Legal Documents (cont.)

WHERE DOCUMENTS ARE STORED

GENERAL STORAGE LOCATION

LAWYER NAME

FIRM

PHONE

NOTES: ANYTHING ELSE ABOUT YOUR LEGAL DOCUMENTS