

The Diocese of Trenton

25 Estate Documents You Need to Have Ready

The Essentials

- Will
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney

Marriage & Divorce

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

Health-Care Confidential

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

Proof of Ownership

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

Life Insurance & 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 User Names & Passwords
- List of Safe-Deposit Boxes

Mariann Gilbride

Associate Director of Development, Major and Planned Gifts

mgilbr@dioceseoftrenton.org

609-403-7146



This brochure contains general gift, estate, and financial planning information for educational purposes. It does not provide legal or tax advice. For advice or assistance on specific gifts and decisions please consult an attorney or other professional advisors.
Planned Giving Content © 2014, PlannedGiving.Com