

One-Page “What Goes Where” — Michigan Estate Plan Map

Keep this page with your important papers and give a copy to your executor/trustee, agents, and close family.

1) Personal info

- Full name, DOB, SSN (store securely), primary address, phone, email**
- Location of original estate documents: _____**

2) Key contacts

- Executor/Personal Representative (named in Will): Name — Phone — Email**
- Trustee (if different): Name — Phone — Email**
- Medical Agent (Medical POA): Name — Phone — Email**
- Financial Agent (Durable POA): Name — Phone — Email**
- Primary Attorney: Name — Phone — Email**
- Backup/alternate contacts: _____**

3) Documents & where to find originals

- Last Will & Testament — Location: _____**
- Revocable Family Trust agreement — Location: _____**
- Lady Bird deed (Enhanced Life Estate deed) — Location: _____**
- Medical Power of Attorney (Healthcare POA) — Location: _____**
- HIPAA Authorization — Location: _____**
- Financial Power of Attorney (Durable POA) — Location: _____**
- Funeral/pre-paid funeral or burial instructions — Location: _____**
- Digital assets & passwords (see separate list) — Location: _____**

4) Real estate & titles

- Primary residence address — Deed type (Lady Bird / Fee simple / In trust): _____**
- Mortgage lender & account #: _____**

- **Other real estate — Address & where titled:** _____

5) Financial accounts (brief)

- **Bank 1 — Institution, last 4 acct #: _____ — Where accessible:**

- **Bank 2 — Institution, last 4 acct #: _____ — Where accessible:**

- **Investment accounts / IRAs / 401(k) — Institution & last 4 #: _____**

— **Beneficiary on record:** _____

- **Life insurance — Company & policy #: _____ — Beneficiary:** _____

6) Important passwords & digital access

- **Password manager location / master password holder:**

- **Email accounts to notify:** _____

- **Social media accounts & login notes:** _____

7) Health & care

- **Primary care physician — Name, phone, clinic:**

- **Major health issues / allergies / medications (short):**

- **Location of Medical POA + HIPAA auth (copy for hospital):**

8) Probate & trust notes (Michigan specifics)

- **Assets titled in trust avoid probate; assets not retitled may need probate.**

- **Lady Bird deed transfers residence at death outside probate while owner retains control.**

9) Immediate first steps for agents/executor (numbered)

1. Locate Will/trust/deeds and contact attorney.

2. File Medical POA and HIPAA auth with hospital if needed.

3. If incapacity, use Financial POA to pay bills and manage accounts.

4. If death, notify beneficiaries, obtain death certificate copies, and follow trust or will instructions.

5. Consult the attorney about probate filing only if assets are not in

trust or covered by Lady Bird deed.

10) Notes / special wishes

- Short funeral preference: _____

- Charitable gifts or specific bequests not in trust/will:

- Other instructions: _____