

Gather Important Documents

Gather together all documentation and keep it in one place. This way, when needed, important papers can be readily accessed to begin the administration of your Estate Plan.

Examples of these documents include:

- Property deeds and titles
- Bank and insurance
- Beneficiary designations
- Marriage, divorce, and separation documents
- Adoption and birth certificates for children
- Business and investment share certificates
- Other vital records

Putting these documents alongside your Estate Planning documents will help to prove ownership or relationship changes in the event of a dispute. By setting out clear and legally sound Estate Plans with supplementary documentation, you can help to make the process easier and less stressful for your family and loved ones.