# Middlebury College

## 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

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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.

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