Estate Planning Checklist

It is important to gather all your information and make your wishes known now to help ensure that your estate will be handled in the way you wish. It can also save your loved ones from having to search for important documents and make difficult decisions during a traumatic time. The list below can help you start to organize all your documents and find the best place to store them.

Important Documents

- ☐ Names and addresses of immediate family members, beneficiaries, executors, trustees and any guardians for your children
- ☐ Your bank account information such as account numbers, login information, locations of the accounts and any safe deposit boxes
- ☐ A list of important usernames and passwords
- ☐ Pension and or retirement account information such as policy numbers, recent statements, and the agent affiliated with each account with their contact information
- ☐ A list of any stock, bond or mutual funds owned
- ☐ Insurance policy information such as a policy number, recent statement, a copy of the policy and the agent affiliated with the policy with their contact information
- ☐ An inventory list of personal possessions such as family heirlooms and any designations of who should receive each item
- ☐ Copies of any prenuptial, postnuptial agreements, divorce decrees or any previous wills
- ☐ A list of your income sources, assets and any real estate owned
- ☐ Information on any trusts created or trusts from which you receive income
- ☐ Tax returns from the last three to four years
- ☐ A list of any other assets not included above

OPPENHEIMER
LIFE AGENCY LTD.

LIFE AGENCY LTD.

Please contact us with questions:

Seldon Clarke, Executive Director – Investments
Phone: (212) 667-4303
Email: Seldon.Clarke@opco.com

Julia Galasso, Business Group Associate
Phone: (212) 667-4121
Email: Julia.Galasso@opco.com