

If you have been an executor or had to help someone locate documents, such as [healthcare detectives](#), or just needed to access someone's online accounts for them, you may have experienced challenges in finding the information. Organization of one's essential documents and provider's contact information is a first step to making their life easier as well as to those who might step in and help when the time comes. The task may seem so daunting that many folks put it off. This action can cause unnecessary delays and complication when help is needed most. This article will propose one way to get organized that should help anyone.



Estate Planning Documents

In our financial practice we retain all relevant documents in a secure electronic format for our clients. Many clients also set up a file folder system to retain this information. You may decide to use one or the other system or both if you are like me. What is important, regardless of the system, is that someone in addition to yourself have approved access to the information. Here is a simple way to organize your information by category of providers:

Your Health

Gather contact information for health care providers. List current medications and with dosage, instructions, and locations. Include a copy of your healthcare powers/living will. Detail your health insurance coverage. Include any information about your plans for elder care living.

Your Wealth

Gather contact information for your financial advisors. Include policies for life and property insurance. Make a list of retirement plans and employment benefits. Create a record of your financial accounts, including how to access them. Outline any real estate you own and your debts.

Your Business

Gather contact information for business advisors and key business contacts. Detail the location for any legal documents or contracts that are important. Have you written down any continuity plans? If so, make sure a copy is enclosed in your record. Include copies of business insurance policies.

Your Person

Gather your logins and passwords in a secure password keeper, and make sure your document how to access this. Do you have specific letters of instruction for your affairs or belongings? Create a schedule or inventory of personal items. Talk with your church and document your funeral wishes. Document the location of property titles.

These lists can get quite elaborate depending on your personal circumstances. What I have listed here is a basic

outline from which to add what might be needed. Consider the list a place to start. [Download a PDF copy of this list.](#)



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