



**EPISCOPAL
COMMUNITY
FOUNDATION**
FOR MIDDLE AND NORTH GEORGIA

Partnering with Episcopal communities in Middle and North Georgia to lift up people facing poverty and oppression, creating sustainable impact for individuals, families, and communities.

Estate Planning Documents Checklist

<https://episcopalcommunityfoundation.org/estate-planning-documents/>

Organization of one's essential documents and provider's contact information is a first step to making your executor or loved one's life easier as well as to those who might step in and help when the time comes. Here is a simple way to organize your information by category of providers:

Your Health	Your Wealth	Your Business	Your Person
Contact information for healthcare providers	Financial Advisors contact information	Advisors contact information	Logins/ Passwords
Current medications	Life and property insurance	Contracts/Legal documents	Letters of instruction
Copy of your Healthcare Powers/Living Will	Retirement plans & employment benefits	Key business contacts	Schedule of personal items
Health insurance coverage	Financial accounts	Continuity Plans	Funeral wishes
Elder care living information	Real estate ownership and debt information	Insurance information	Property titles