
Gary B. Schreiner, J.D., AEP®
Gary@Willplan.com

Janet Forgione, Paralegal
Janet@Willplan.com

Liza Schreiner, Paralegal
Liza@Willplan.com

THE SCHREINER LAW GROUP, P.C.

285 Jericho Turnpike, 2nd Floor
Mineola, New York 11501-1626

T. (516) 922-8400
F. (516) 706-0586
www.willplan.com

Estate Planning Checklist

How will my family know where to find all my important documents?

Fill out the following form to help your survivors know what to look for after your death:

Document:	Where to look:
Address book	
Friends, family names	
Professional contacts:	
Attorney	
Accountant	
Financial planner	
Insurance contact	
Appraisals	
Antiques	
Collectibles	
Jewelry	
Musical instruments	
Silverware	
Bank statements	
Beneficiary designations:	
Company retirement plans	
IRAs	
Other	
Brokerage statements	
Car title	
Cemetery records or deeds	
Checkbook	
Company benefits	



Accidental death & dismemberment
Special death benefits

Document	Where to Look
Credit card death benefits	
Credit card statements	
Divorce decree	
Driver's license	
Final wishes: funeral arrangements, memorial services	
House deed	
Life insurance policies	
Company provided	
Loan documentation	
Marriage license	
Military discharge papers	
Mortgage	
Organ donor?	
Passport	
Pets	
Who will care for them	
Prenuptial agreement	
Safe	
Combination	
Location	
Safe deposit box	
Location of box	
Location of key	
Social Security card	
Tax returns	
Wills, trusts, other estate documents	

