

Planning Your Estate

Please include the following information and documentation in a Binder:

1. List of any real estate you own. Include the property address, when acquired, any outstanding loans with mortgage information. Include any timeshare information.
2. List of any personal property you own. Include the type of vehicle, boat, motor home, motorcycle, etc.
3. List of any outstanding debts and include the amount owe and to whom.
4. Telephone numbers and addresses for all of your doctors.
5. List of prescribed medications. Include medication name, dosage, and who prescribes them.
6. Where your car titles are and who your auto insurance is with. Name of your insurance agency and phone number.