



# Paäge et Cie

PERSONAL MANAGEMENT SERVICES  
WE MANAGE ALL FACETS OF YOUR LIFE  
59 Beech Hill Road | Scarsdale, NY 10583  
914.725.0343 | 914.725.0243 | [www.paageetcie.com](http://www.paageetcie.com)

## ESTATE PLANNING CHECKLIST

	HAVE	NEED	N/A	LOCATION	NOTES
<b>VITAL DOCUMENTS</b>					
Adoption Papers					
Advance Directives					
Beneficiary Designations					
Birth Certificate					
Burial Instructions					
Child Custody Agreement					
Citizenship/Naturalization Papers					
Computer Usernames and Passwords					
Contact List - Family & Friends					
Contact List - Professional Advisors					
Contact List - Banker					
Contact List - Wealth Manager					
Contact List - Spiritual Leader					
Coop Proprietary Lease					
Coop Stock Certificate					
Deed - Cemetery					
Deed - Property					
Divorce Decree					
Domestic Partner Agreement					
Driver's License					
Executor/Exectrix					
Final Wishes					
Government Photo ID					
Guardian for Minor Children					
Health Care Proxy					
Letter of Instructions (Final Wishes)					
Living Will					
Marriage Certificates					
Military Discharge Papers					

	HAVE	NEED	N/A	LOCATION	NOTES
Organ Donor Information					
Passport					
Pet Instructions					
Powers of Attorney					
Prenuptial Agreement					
Safe Deposit Boxes Contents					
Safe Deposit Box Keys					
Safes & Combinations (Home of Business)					
Separation Agreement					
Social Security Card					
Stock Certificates					
Storage (Off-Site) Keys & Codes					
Trust Agreements					
Vehicle Registration & Title					
Veteran's Administration Documents					
Will					

## FINANCIAL INFORMATION

Annuity Contracts					
ATM/Debit Card					
Bank Statements - Checking					
Bank Statements - Savings					
Bonds					
Brokerage Accounts					
Certificates of Deposit					
Credit Card Accounts (Copies or List)					
Death Certificates (Loved Ones)					
Deferred Compensation Documents					
Income Tax Returns					
Inventory of Assets (Include Appraisals)					
Legal Actions / Lawsuits					
Money Market Accounts					
Mortgage Documents					
Outstanding Loans					
Partnership Agreements					

	HAVE	NEED	N/A	LOCATION	NOTES
Pension Statements					
Property Taxes Statements					
Rental Property Documents					
Retirement Accounts					
Social Security Benefits					
Stock Certificates					
Vehicle Registrations & Titles					

## INSURANCE INFORMATION

Accidental Death & Dismemberment (AD&D)					
Auto Insurance Policy					
Auto - Collector Car Policy					
Aviation Policy					
Disability Policy					
Excess Liability Policy					
Flood Policy					
Health Insurance Card & Policy					
Homeowners Policy - Home & Contents					
Homeowners Policy - Valuable Articles					
Hurricane Policy					
Life Insurance Policy					
Long Term Care Policy					
Mortgage Insurance Policy					
Renter's Policy					
VA Insurance Policy					
Watercraft Policy - Boats & Yachts					

## LIFESTYLE

Gym Membership					
Loyalty/Rewards Programs					
Memberships - Business					
Memberships - Social					
Private Clubs					