

# Estate Planning List

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## Important Legal Documents and Financial Statements

Organizing your legal and financial documents is an important step in retirement and estate planning. Should the unexpected happen, your loved ones and legal and financial advisors will have all the necessary information in one useful list.

The New York State Teachers' Retirement System (NYSTRS) provides the following guideline for organizing your records. To protect your confidential information, keep this document in a secure place and share it with only those whom you trust to carry out your wishes.

**Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

## Vital Papers and Other Important Information

### 1. Will

- a) Location \_\_\_\_\_
- b) Location of copies \_\_\_\_\_
- c) Date of last update \_\_\_\_\_
- d) Prepared by \_\_\_\_\_
- e) Name and address of executor or executrix \_\_\_\_\_  
\_\_\_\_\_
- f) Guardian(s) of children \_\_\_\_\_  
\_\_\_\_\_

### 2. Durable Power of Attorney

- a) Location \_\_\_\_\_
- b) Location of copies \_\_\_\_\_
- c) Date of last update \_\_\_\_\_
- d) Name and address of representative(s) \_\_\_\_\_

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## 3. Health Care Proxy

- a) Location \_\_\_\_\_
- b) Location of copies \_\_\_\_\_
- c) Date of last update \_\_\_\_\_
- d) Name and address of representative(s) \_\_\_\_\_

## 4. Living Will

- a) Location \_\_\_\_\_
- b) Location of copies \_\_\_\_\_
- c) Names of those who have copies \_\_\_\_\_  
\_\_\_\_\_

## 5. Life Insurance

- | a) | Company | Policy # | Beneficiary | Type of Insurance |
|----|---------|----------|-------------|-------------------|
|    | _____   | _____    | _____       | _____             |
|    | _____   | _____    | _____       | _____             |
|    | _____   | _____    | _____       | _____             |
- b) Location of policies \_\_\_\_\_
  - c) Name, address, and telephone # of agent(s) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## 6. Health Insurance

- | a) | Company | Policy # | Who is Covered | Type of Insurance |
|----|---------|----------|----------------|-------------------|
|    | _____   | _____    | _____          | _____             |
|    | _____   | _____    | _____          | _____             |
|    | _____   | _____    | _____          | _____             |
- b) Location of policies \_\_\_\_\_
  - c) Name, address, and telephone # of agent(s) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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## 7. Long-Term Care Insurance

- a)      **Company**                      **Policy #**                      **Beneficiary**                      **Type of Insurance**
- \_\_\_\_\_
- b)      Location of policies \_\_\_\_\_
- c)      Name, address, and telephone # of agent(s) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 8. Automobile Insurance

- a)      **Company**                      **Policy #**                      **Collision?**                      **Comprehensive?**
- \_\_\_\_\_
- b)      Location of policies \_\_\_\_\_
- c)      Name, address, and telephone # of agent(s) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 9. Liability and Property Insurance

- a)      **Company**                      **Policy #**                      **Property Insured**                      .
- \_\_\_\_\_
- b)      Location of policies \_\_\_\_\_
- c)      Name, address, and telephone # of agent(s) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 10. Birth Certificate

- a)      Location of originals \_\_\_\_\_
- b)      Location of copies \_\_\_\_\_

## 11. Marriage License/Divorce Documents

- a)      Location of originals \_\_\_\_\_
- b)      Location of copies \_\_\_\_\_

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## 12. Military Records

- a) Location of originals \_\_\_\_\_
- b) Location of copies \_\_\_\_\_

## 13. Titles and Deeds to Property

- a) House:
  - 1) Location \_\_\_\_\_
  - 2) Location of copies \_\_\_\_\_
- b) Car:
  - 1) Location \_\_\_\_\_
  - 2) Location of copies \_\_\_\_\_
- c) Other property or real estate:
  - 1) Location \_\_\_\_\_
  - 2) Location of copies \_\_\_\_\_

## 14. Bank Records

Name/Address of Bank	Acct. Type	Acct. #	Record Location
_____			
_____			
_____			
_____			

## 15. Safe Deposit Box

Location	Box #	Who Has Access	Location of Keys
_____			
_____			

## 16. Valuables (jewelry, antiques, coins, art works, etc.)

Description	Appraised Value	Is Valuable Insured?	Location
_____			
_____			
_____			
_____			

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## 17. Investments (mutual funds, IRAs, CDs, checking accounts, TSAs, savings accounts, bonds, etc.)

Type	ID/Acct. #	Location of Papers	Agent or Broker

## 18. Credit Cards and Charge Accounts

Name of Card/Store	ID/Acct. #	Who to Contact if Lost/Stolen

## 19. Debts

Type	Owed to Whom	Payment Amount	Due Date

## 20. Income Tax Information

Location of current tax year documents \_\_\_\_\_

Location of prior year tax returns \_\_\_\_\_

## 21. NYSTRS Retirement Benefit Information

NYSTRS EmplID (i.e., membership number): \_\_\_\_\_

Location of Profile Statement: \_\_\_\_\_

Call NYSTRS at 800-348-7298 and use the applicable extension to report the death of a:  
Retiree: ext. 6140 | Benefit Recipient: ext. 6150 | Active Member: ext. 6110

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## 22. Other Retirement Benefit Information

	Location of Statement	Beneficiary	Contact #
a)	Social Security _____		
b)	Other _____		
c)	Other _____		

## 23. Professional or Financial Advisors

Company/Firm	Contact Person	Address	Phone Number
_____			
_____			
_____			
_____			
_____			
_____			
_____			

## 24. Funeral and Burial Arrangements

Funeral Home: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

Cemetery or Other Burial Arrangements: \_\_\_\_\_