

Estate Planning List

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: _____