

INFORMATION & HELPFUL DOCUMENTS TO GATHER TO ASSIST MANAGING AN ESTATE AFTER SOMEONE PASSES AWAY



The following list includes important documents, items of value and contact information that should be located, collected, inventoried & secured in order to assist in settling someone's estate. It's an ideal list to keep in mind if you're helping pack or organize the decedent's possessions. The documents, items of value and contact information will need to be turned over to the legally recognized Administrator or Personal Representative for the decedent.

PERSONAL & FAMILY

- Birth certificates
- Marriage certificate
- Citizenship papers
- Divorce/separation papers
- Adoption papers
- Relatives (names, phone, addresses)
- Social Security numbers/cards
- Passports (numbers, expiration dates)
- Driver license (numbers, expiration dates)
- California ID Card
- Military records
- Education

MEDICAL

- Health care professionals (names, address/telephone)
- Physicians
- Other professionals
- Medicare numbers
- Medicaid/Medi-Cal numbers (caseworker numbers, address/telephone)
- Social worker or Caseworker names (address/telephone)
- Dentists
- Pharmacists
- Health care proxies/living wills
- Hospitals (address/telephone)

FINANCIAL

Income Sources

- Retirement
- Disability benefits
- Social Security

Financial Assets (institution, account #s, address/phone, form of ownership, current value)

- Cash
- Life insurance
- Annuities
- 401k or 403b
- Retirement & Pension plans
- Money market funds
- Bank accounts
- Mutual funds
- Bonds
- Stocks
- IRAs

Real Estate (addresses, location of deeds, form of ownership, insurance, current value)

- Primary home
- Investment property
- Vacation home

Other Assets (location of items/titles/documents, form of ownership, insurance, value)

- Automobiles
- Boats
- Interests in businesses
- Inheritances
- Precious gems
- Loans to family members/friends
- Collectibles
- Hidden valuables/items in storage

Be certain you understand the Tax consequences to the Estate vs. the Heirs if various assets are sold before or after they are distributed.

We highly recommend seeking Legal and/or Accounting advice before taking any action

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Liabilities (creditor institutions, address/telephone, approximate debt)

- | | | |
|---------------------------------------|---|--------------------------------|
| <input type="checkbox"/> Mortgages | <input type="checkbox"/> IOUs | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Credit cards | <input type="checkbox"/> Personal loans | |

INSURANCE — (For each policy, list the company name, policy number, and address)

- | | | |
|---|---|--|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Disability | <input type="checkbox"/> Health |
| <input type="checkbox"/> Liability | <input type="checkbox"/> Long-term care | <input type="checkbox"/> Automobile |
| <input type="checkbox"/> Dental | <input type="checkbox"/> Homeowners/renters | <input type="checkbox"/> Medigap-supplemental health |



LEGAL

- | | |
|--|--|
| <input type="checkbox"/> Wills (dates of documents, executor names, address/telephone) | <input type="checkbox"/> Health care proxies |
| <input type="checkbox"/> Powers of Attorney (names, including backup, address/phone) | <input type="checkbox"/> Living wills |
| <input type="checkbox"/> Durable Powers of Attorney (names, including backup, address/phone) | <input type="checkbox"/> Durable medical |
| <input type="checkbox"/> Guardianships/Conservatorships (names, address/telephone) | |
| <input type="checkbox"/> Trust agreements | |

OTHER IMPORTANT CONTACTS

Professional Advisors other than Health Care (names, address/telephone)

- | | | |
|--------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> Attorneys | <input type="checkbox"/> Financial advisors | <input type="checkbox"/> Bankers |
| <input type="checkbox"/> Accountants | <input type="checkbox"/> Insurance agents | <input type="checkbox"/> Stockbrokers |
| <input type="checkbox"/> Clergy | | |

- Service providers (names, address/telephone): gardeners, drivers, etc.
- Club memberships, volunteer activities, and senior centers (names, address/telephone)
- Subscriptions (magazines, newspapers, book of month, supplements, crafts, etc.)
- Landlord (name, address/telephone)
- Past employers (company names, address/telephone, dates of retirement, contact persons, employee ID numbers)
- Close friends and neighbors (names, address/telephone, indicate those who have keys to house/apartment/condominium)

OTHER INFORMATION

- Inventory of family historical records (documents, photos, keepsakes)
- Safe deposit boxes (institution names, address/telephone, location of keys and list of contents, other names on safe deposit boxes)
- Tax records

'Consider having family photos scanned by a professional service and giving all interested family members digital copies to print as they see fit. This also insures that if the originals were to ever be destroyed, the family history is not lost.'

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