Outline of an Estate Plan

Section 1 – Important Contacts

- Church/Pastor
- Funeral Home
- Family/Friends

Section II – Advisors and Financial Information

- Contacts
  - Financial Advisor
  - Attorney
  - CPA/Accountant
  - Stockbroker
  - Pensions Benefits Officer
  - Employer
  - Mortgage Holder
  - Property Casualty Insurance Agent
  - Banker
- Assets
  - Retirement Accounts
    - Qualified Plans through Employer
    - Social Security
    - IRA – Traditional, Roth, SEP, SIMPLE,
  - Annuities
  - Military Retirement Benefits
  - Military Survivor Benefits
  - Stock Options
  - Stock Purchases
  - Bonds
  - Money Market Accounts
  - Bank Accounts
  - Mutual Funds
  - Real Estate/Property
  - Frequent Flyer Miles
  - Money Owed to You
  - Loans Forgiven
  - Lawsuits
  - Other
- Liabilities
  - Mortgage Holders
  - Loans – Personal, Auto, etc.
  - My Responsibilities
    - Ongoing personal obligations you want to keep going
  - Credit Cards

Section III – Insurance and Benefits

- Life Insurance
- Disability Insurance
- Long-Term Care
- Medicare
- Medigap (Medicare Supplement)
- Medicare Part D
- Property Casualty Insurance Policies
- Employment Benefits

Section IV – Documents and Other Information

- Document Chart
- General Information
- Personal Property
- Power of Attorney Information
- Funeral Plans and Wishes

Section V – Family History and Ethical Will

- Family History
- Ethical Will