

Executor Document Checklist

Legal & Identification

- ☐ Will or Living Trust
- ☐ Death Certificate (originals)
- ☐ Social Security Card
- ☐ Marriage or Divorce Certificate
- ☐ Birth Certificate

Financial & Insurance

- ☐ List of Bank Accounts (with contacts)
- ☐ Life Insurance Policy Documents
- ☐ Deeds or Property Titles
- ☐ Retirement/Investment Account Info
- ☐ Credit Card & Debt Account List

Access & Instructions

- ☐ Safe Deposit Box Key/Location
- ☐ Password List or Digital Vault Access
- ☐ Funeral Preferences / Pre-Paid Info
- ☐ Contact List (Attorney, Accountant, etc.)
- ☐ Instruction Letter to Executor

Where to Find Each Document

Document	Location	Contact/Notes