Estate Planning Tax Organizer Checklist

1. Personal Information

- ◯ Your full name, Social Security number
- ◯ Spouse's and dependents' info
- ◯ Marriage/divorce certificates
- ◯ Citizenship documents (if applicable)
- ◯ Health information and directives

2. Assets

- ◯ Bank & investment accounts
- ◯ Retirement accounts (IRA, 401(k))
- ◯ Real estate & property
- ◯ Life insurance policies
- ◯ Business ownership

3. Other Documents

- ◯ Adoption papers
- ◯ Legal settlements (if applicable)
- ◯ Funeral or burial instructions
- ◯ Birth and death certificates (if relevant)

4. Liabilities

- ◯ Mortgage & loans
- ◯ Credit card debt
- ◯ Other debts

5. Estate Documents

- ◯ Will & Trusts
- ◯ Power of Attorney
- ◯ Healthcare directives
- ◯ Beneficiary details

6. Tax Info

- ◯ Last year's tax return
- ◯ Gift taxes, charitable donations
- ◯ Income from estates/trusts