

Estate Plan Inventory Guide

Complete the Estate Plan Inventory Guide in Two Easy Steps

Coping with the death of a loved one is a trying and emotional time. By purchasing a life insurance policy from Massachusetts Mutual Life Insurance Company (MassMutual), you've already taken the first step in protecting the ones you love financially. You can also help your loved ones through this process by having your financial documentation in good order.

This inventory guide will help you organize your important documents and provide your loved ones a reference for locating them in the future. This guide should be kept in a safe and convenient location. A copy may also be provided to your trusted advisor for safekeeping. Review this information annually and update as circumstances change.

Step 1: List Important Locations and People

Create an itemized list of the various locations of your important policies, documents and advisors.

EXAMPLE

A. Residence

Address: 1234 Park Street
Springfield, MA 01111

Locations (e.g., filing cabinet, safe):

- 1) Safe behind picture in living room
- 2) Filing cabinet in office
- 3) Lock box in utility closet
- 4) Thumb drive in desk

Note that the address is listed first, with sub-locations listed below. If all of your important documents and policies are not located in one spot within your residence, be sure to specify exact locations.

EXAMPLE

C. Safe Deposit Box (address, location and box number)

Address: Bank of America (Phone #)
285 Huntington Ave. Boston, MA 02115

Location of key: In safe in living room

This lists a Safe Deposit Box along with the phone number, the address and the key location.

The information provided is not written or intended as specific tax or legal advice. MassMutual, its subsidiaries, employees, and representatives are not authorized to give tax or legal advice. Individuals are encouraged to seek advice from their own tax or legal counsel. Individuals involved in the estate planning process should work with an estate planning team, including their own personal legal or tax counsel.

A. Residence

Address: _____

Locations (e.g., filing cabinet, safe):

- 1) _____
- 2) _____
- 3) _____

B. Office

Address: _____

Locations (e.g., filing cabinet, safe, desk):

- 1) _____
- 2) _____
- 3) _____

C. Safe Deposit Box (address, location and box number)

Address: _____

Location of key: _____

D. Attorney(s) (name(s), address(es), and phone number(s))

E. CPA/Tax Advisor(s) (name(s), address(es), and phone number(s))

F. Other (name(s), address(es), and phone number(s))

Digital Assets List

Creating a digital assets list may sound simple enough, but can have repercussions if provided casually. You should work with your personal tax and/or legal advisors to provide the proper guidance needed specifically for your fiduciary or other designated person(s) to access the content of your digital assets.

In a document separate from your estate planning documents, list your digital assets, access information, recipient (if any) and your wishes for each asset. Alternatively you might consider online password management software. Make sure you provide directions so your executor or other designated party can access that software.



Step 2: Complete Document Location Key

Use the preceding location identifiers to indicate the location of the following applicable documents, using the location's corresponding letter and sub-location number.

EXAMPLE

	Original	Copy
Legal Documents		
Last Will and Testament	<u>C</u>	<u>A2</u>

C indicates that the original document can be found in the safe deposit box and A2 indicates that a copy is at your residence in location 2, filing cabinet in office. (see sample locations in Step 1).

	Original	Copy
Legal Documents		
Last Will and Testament	_____	_____
Tax Returns	_____	_____
Marriage Certificate	_____	_____
Citizenship Papers	_____	_____
Birth Certificate(s)	_____	_____
Spouse's Will	_____	_____
Military Discharge Papers	_____	_____
Trust Agreements	_____	_____
Power(s) of Attorney	_____	_____
Children Custodial/Adoption Papers	_____	_____
Divorce/Separation Papers	_____	_____
Cemetery Plot Deed	_____	_____
Insurance Policies		
Life Insurance	_____	_____
Final Expense Insurance	_____	_____
Disability Insurance	_____	_____
Homeowners	_____	_____
Automobile(s)	_____	_____
Health/Medical/LTC	_____	_____
Investments		
Brokerage Accounts	_____	_____
Mutual Funds	_____	_____
Stock Certificates	_____	_____
Bonds	_____	_____
Additional Securities	_____	_____
Investment Records	_____	_____
Collectibles	_____	_____
Appraisals (Real Estate, Art, Jewelry, Antiques, Collectibles)	_____	_____

	Original	Copy
Business Papers		
Buy-Sell Agreements	_____	_____
Cross Purchase Agreements	_____	_____
Split Dollar Arrangements	_____	_____
Employment Contracts	_____	_____
Misc. _____	_____	_____
Retirement		
Pension Plan	_____	_____
401(k)	_____	_____
IRA	_____	_____
Keogh Plan	_____	_____
Annuity Contract	_____	_____
Social Security	_____	_____
Deferred Comp	_____	_____
Real Estate/Property/Debt		
Home Deed	_____	_____
Second Property Deed	_____	_____
Rental Property Deed	_____	_____
Mortgage(s)	_____	_____
List of Credit Cards	_____	_____
Loans/Notes	_____	_____
Banking Information		
Checking Account(s)	_____	_____
Savings Account(s)	_____	_____
Certificates of Deposit	_____	_____
Account Statements	_____	_____
Miscellaneous		
Burial Instructions	_____	_____
Special Bequests	_____	_____
Safe Keys/Combinations	_____	_____
Various Memberships	_____	_____
Digital Assets List	_____	_____

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