

Essential Estate Planning Document Checklist

Will and Testament

- Last Will and Testament (properly executed and witnessed)
- Codicils or amendments to the Will
- Registration certificate (if Will is registered)
- List of assets and beneficiaries attached to Will
- Letter of wishes (supplementary to Will)

Power of Attorney Documents

- Durable Power of Attorney for financial matters
- Medical Power of Attorney for healthcare decisions
- Special Power of Attorney (if any)
- Property Power of Attorney (if applicable)
- Revocation documents for previous POAs

Personal Identification

- Aadhaar Card
- PAN Card
- Passport
- Voter ID
- Driving License
- Marriage Certificate
- Birth Certificate

Banking Records

- Savings Account statements
- Current Account statements
- Fixed Deposit certificates
- Locker agreements and nominations
- Credit/Debit card statements
- Internet banking details

Investment Documents

- Mutual Fund statements
- Share certificates/Demat account statements
- Bond certificates
- Post Office savings certificates
- PPF account statements
- National Savings Certificates

Insurance Papers

- Life Insurance policies
- Health Insurance policies
- Property Insurance documents
- Vehicle Insurance papers
- Term Insurance certificates
- Insurance nominations

Retirement Accounts

- Employee Provident Fund (EPF) documents
- National Pension System (NPS) papers
- Pension documents
- Gratuity papers

<p><i>Real Estate</i></p>	<ul style="list-style-type: none"><input type="checkbox"/> Property sale deeds<input type="checkbox"/> Property tax receipts<input type="checkbox"/> Municipal tax payments<input type="checkbox"/> Property insurance papers<input type="checkbox"/> Mortgage documents<input type="checkbox"/> Lease agreements<input type="checkbox"/> Society maintenance receipts<input type="checkbox"/> Construction/Building permits
<p><i>Vehicle Documents</i></p>	<ul style="list-style-type: none"><input type="checkbox"/> Registration certificates (RC)<input type="checkbox"/> Insurance papers<input type="checkbox"/> Loan documents<input type="checkbox"/> Fitness certificates<input type="checkbox"/> Transfer papers
<p><i>Business Ownership</i></p>	<ul style="list-style-type: none"><input type="checkbox"/> Partnership deeds<input type="checkbox"/> Shareholding certificates<input type="checkbox"/> Director identification number (DIN)<input type="checkbox"/> Business registration certificates<input type="checkbox"/> GST registration<input type="checkbox"/> Trade licenses

Business Operations

- Business insurance policies
- Employee contracts
- Vendor agreements
- Lease agreements
- Intellectual property documents

Loan Documents

- Home loan papers
- Vehicle loan documents
- Personal loan agreements
- Education loan documents
- Credit card statements
- Loan repayment schedules

Family Records

- Marriage certificates
- Birth certificates of children
- Adoption papers (if any)
- Divorce decree (if applicable)
- Guardianship papers
- Family trust deeds

Medical Records

- Medical history files
- Vaccination records
- Health insurance cards
- Living Will/Advanced directives
- Regular prescription records
- Doctor's reports

*Digital Assets
Documentation*

- List of email accounts
- Social media account details
- Digital wallet information
- Cryptocurrency holdings
- Online shopping accounts
- Cloud storage accounts
- Password manager details
- Digital asset inventory
- Recovery codes
- Two-factor authentication backups
- Digital legacy instructions

Tax Records

- Income Tax returns (last 3 years)
- Form 16s
- Tax payment challans
- TDS certificates
- Capital gains statements
- Property tax receipts

Important Contacts

- List of lawyers/legal advisors
- Financial planners/advisors
- Insurance agents
- Doctors and hospitals
- Accountants
- Family members/executors

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