



## **Where Should You Keep Your Estate Planning Documents?**

Where you store your documents can be just as critical as preparing them. There are many places that you can keep your original estate planning documents, but here are a few things to consider:

- You should keep your original documents in a safe, but easily accessible place. They must be available in a timely manner should your agents need to use them.
- They should be stored in a place that is protected from theft, fire, flood, or other natural disasters.
- If you choose to keep your documents in a safe deposit box, please make sure that you have given your primary and/or alternate agent (if your primary agent is your spouse) authority to access the safe deposit box by filling out the appropriate forms at your banking institution. If you do not add your agent(s) as authorized persons at the bank where the safe deposit box is held, your agents will not be able to access the box to retrieve your estate planning documents if something happens to you.
- You should tell your agent(s) and personal representative(s) where you are storing your documents.

## **Who Should Get Copies of Your Estate Planning Documents?**

To some extent, who you distribute your documents to is a matter of personal preference. You may feel comfortable giving a copy of your estate plan to those you're closest to, such as your named agents or your close friends and family members), or you may feel more comfortable simply telling them where you keep your documents so they can locate them if something happens. Here are some suggestions:

- Health Care Power of Attorney:
  - Your primary and/or alternate agents
  - Your doctor's office
- Durable Power of Attorney:
  - Your primary and/or alternate agents
  - Your bank
  - Your Investment Advisor or Financial Planner
  - Your CPA
- Authorization for Final Disposition:
  - Your primary and/or alternate agents
  - Your funeral home of preference, if any