

Worksheet 5: Legal Documents Tracker

Goal: Identify which essential documents exist, where they're stored, and what's still missing, so families can plan confidently.

Type	Done	Location/Filing	Who Has a Copy	Notes
Will				
Financial POA				
Medical POA				
Trust				
Living Will				
Deed				
Deed				
Title				
Title				
Insurance				
Insurance				
Birth Certificate	n/a			
Birth Certificate	n/a			

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Pro Tip: Keep all originals in a safe, easily accessible place, and share copies with trusted family members or advisors.

Action Items

Task/Follow Up	Responsible Person	Target Date	Done
Review documents with attorney			
Update beneficiaries on policies/acct			
Confirm POAs are notarized and current			
Locate missing papers & make copies			
Store digital backups securely			

Pro Tip: A clearly labeled folder and an up-to-date list can save weeks of stress later; update this worksheet every year or after any major life change.