**Organizing Documents and Information for Estate Planning in Ohio**

While most people imagine their death bed when they consider estate planning, in reality, it is about having control over your assets and property during your lifetime and after you pass away. An important aspect of having complete control is the proper organization of related information and documents. By keeping legal documents, bank statements, receipts, bills, digital information, and other documents well-organized, you can make it easy for your family to go through the probate process and for your executor to distribute your assets as per your wishes.

If you are wondering what kind of information and documents are important for estate planning, here is all you need to know to make sure you have everything organized when the right time comes.

**Important Information for Estate Planning**

For estate planning, you need to get a number of things in order, which can take up a lot of time. A good approach can be to break down the organization of information from different sources into small groups, working on each group one at a time. The following are some of the important information categories you can classify important information groups into:

* Living trusts, powers of attorney, deeds, wills, and other documents you have included in your estate plan
* Items that are kept in lockboxes, safes, safety deposit boxes, or in any secret place
* Funeral plans, along with arrangement method, and the name of the appointed individual to oversee the ceremony
* Items of significance, including photographs, heirlooms, and others that you think are irreplaceable
* Mutual fund, bank, and money market accounts
* Contact of important individuals, such as CPAs, insurance agents, attorneys, and others
* Pension accounts
* Stocks and bonds
* Retirement accounts
* Insurance policies

Once you have gathered all the information, be sure to organize them in a way that is understandable for people who will be viewing it after you. A good idea is to use a tool or software dedicated for organizing information for estate planning.

**Important Documents for Estate Planning**

* **Financial Information:** For getting your financial information in order, you need to first make a list of your income sources along with the amounts and bills with due dates. Jot down your assets and debts, and include account numbers, institution names, phone numbers, addresses, and other contact information. If possible, keep copies of loan documents, titles, and recent statements.
* **Estate Planning Documents:** [Work with an experienced attorney](https://johngrundy.com/estate-planning/) to prepare an estate plan that meets your specific needs. If you want your family to avoid probate, you can create a living trust or if you want to plan for disability, you can use powers of attorney to designate individuals who will make healthcare and financial decisions on your behalf. You can even appoint a guardian for your children with the help of a living trust.
* **Digital Assets and Other Documents:** Compile a list of different online accounts and digital assets, and include the credentials of those that are password protected. Make sure that you backup your important files on a regular basis to prevent loss of information due to theft. Other documents that are important for estate planning include marriage and birth certificates, passports, recent tax returns, and social security numbers.

For legal help in estate planning in Ohio, you should consider working with an experienced attorney with in-depth knowledge of the practice area. [Contact](http://johngrundy.com/contact-us/) the Law Office of John C. Grundy at 330.637.9030 or online to schedule your consultation today.