JOHN HANCOCK INSURANCE

DOCUMENT GUIDE

Advanced Markets

Estate Planning Document Guide

A tool to help administer your estate

LIFE-5712 8/15

John Hancock Life Insurance Company (U.S.A.) (John Hancock)
John Hancock Life Insurance Company of New York (John Hancock)

TABLE OF CONTENTS

FOR THE ESTATE OF

Name:

Executor's Name:

Date Checklist Completed:

Obtain copies of each of the following items and place in the same envelope as this Document Guide.

DOCUMENT CHECKLIST

Retirement Plan

Primary and contingent beneficiary designation form for:

- ☐ IRAs
- ☐ Retirement Plans (401(k), 403(b), SEP, etc.)
- ☐ Annuities
- ☐ Life Insurance Policies
- ☐ Non-Qualified Deferred Compensation Plans
- ☐ Qualified Pension Plan
- ☐ Other Employer-Provided Plans

Estate Planning

- ☐ Will(s)
- ☐ Durable Power of Attorney
- ☐ Health Care Proxy
- ☐ Trust Document(s)
- ☐ Letter of Specific Bequests
- ☐ Ethical Will
- ☐ Divorce Agreement
- ☐ Prenuptial Agreement

Personal Data

- ☐ Birth Certificate
- ☐ Social Security Card
- ☐ Marriage License
- ☐ Passport
- ☐ Summary of Critical Medical Information (including family history)
- ☐ Cemetery Plot Information
- ☐ Funeral Instructions
- ☐ Military Discharge Paperwork
- ☐ Organ Donor Card
- ☐ Adoption Agreement
- ☐ Citizenship Papers

Insurance

- ☐ Life Insurance Policies
- ☐ Disability Insurance Policies
- ☐ Medical and Dental Insurance Policies
- ☐ Health/Dental Insurance Membership Cards
- ☐ Long-Term Care Insurance Policies
- ☐ Home Owner's/Rental Insurance Policies
- ☐ Auto Insurance Policies
- ☐ Umbrella Liability Insurance Policies
- ☐ Other Insurance Policies
- ☐ Asset Appraisals

Savings/Investment Accounts

- ☐ List and/or Copies of Savings Bonds
- ☐ List and/or Copies of Stock and Bond Certificates

Property

- ☐ Business Buy-Sell Agreement
- ☐ Copy of Deed for Home
- ☐ Copy of Deed for Car(s)
- ☐ Copy of Deed for Other Real Estate
- ☐ Mortgage/Loan Information and/or Discharge Paperwork
- ☐ Auto Lease Agreement

SAVINGS AND INVESTMENTS

Bank and Investment Brokerage Accounts

Bank/Custodian Name	Address/Phone Number	Account Number

Bank and Investment Brokerage Accounts (continued)

Bank/Custodian Name	Address/Phone Number	Account Number

OTHER IMPORTANT INFORMATION

Safe Deposit Box(es)

Bank/Custodian Name	Address	Account Number

Credit Card Information

Issuer	Account Number	Phone Number

DOCUMENT LOCATION GUIDE

Give a description of the various locations where you store your documents.

Example: Location #1 – Third drawer in home office files.

Item	Location Description
1)	
2)	
3)	
4)	
5)	
6)	
7)	
8)	

ADDITIONAL CONSIDERATIONS FOR ONLINE ACCOUNTS

Due to the popularity of Facebook, Twitter and e-mail, you should think about what you would like to happen to electronic items upon your death. Who will have access to your accounts? Should they exist after your death? Just like the distribution of assets is a personal decision, so too, are the choices you will make with regard to online accounts.

IMPORTANT CONTACTS

Financial Advisor

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Attorney

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Accountant

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Physician

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Employer

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Other

Name:

Address:

City/State/Zip:

Tel:

Fax:

E-mail:

Insurance products are issued by: John Hancock Life Insurance Company (U.S.A.), Boston, MA 02117 (not licensed in New York)
and John Hancock Life Insurance Company of New York, Valhalla, NY 10595.

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