

The Legacy & Estate Plan Organizer

Crespo Capital

A confidential guide to your most important documents.

Organizing your critical documents is one of the most important steps in creating a comprehensive estate plan. This organizer is designed to help you and your family locate key documents and understand your wishes. Please complete this form, store it in a secure location (such as a fireproof safe or a bank safe deposit box), and inform your executor or trustee where it can be found.

Crespo Capital

inquiries@crespocapital.com

This organizer is for informational purposes only and does not constitute legal or financial advice.

Core Estate Documents

Last Will and Testament

Location:

Revocable Living Trust Documents

Location:

Durable Power of Attorney (Financial)

Agent's Name:

Location:

Healthcare Power of Attorney / Proxy

Agent's Name:

Location:

Living Will / Advanced Directive

Location:

Financial Accounts: Taxable

List all checking, savings, brokerage, and other non-retirement accounts.

Institutions	Account Type (e.g., Checking)	Account Number

Financial Accounts: Retirement

List all 401(k), 403(b), IRA, Roth IRA, SEP IRA, and other retirement accounts.

Institutions	Account Type (e.g., 401k, IRA)	Account Number

Insurance Policies

Life Insurance

Insurance Company	Policy Number	Benefit Amount

Disability Insurance

Insurance Company	Policy Number	Benefit Amount

Long-term care Insurance

Insurance Company	Policy Number	Benefit Amount

Digital & Crypto Assets

Password Manager

Provide instructions for a trusted individual on how to access your password manager. Do not write the master password here.

Service Name	Master Password Location

Cryptocurrency Assets

List all cryptocurrency holdings. Note the location of any hardware wallets or seed phrases separately.

Asset (e.g., BTC)	Exchange / Wallet Name	Seed Phrase Location

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