



The Rutherford Law Firm, PLLC

WILLS · TRUSTS · PROBATE · ESTATE ADMINISTRATION

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ESTATE PLANNING · FAMILY RECORD

Document Locator: Where My Documents Are

A plan only works if your family can find it. Use this record to tell the people you trust where your documents and key information are kept. Store the completed locator with your other papers, and give a copy to your executor or agent. Do not write account passwords here.

◆ Core documents — location

Will (original)¹

Trust documents

Statutory durable power of attorney²

Medical power of attorney & directive to physicians³

Deeds, titles, and vehicle titles

Insurance policies

Birth, marriage, military, and citizenship records

◆ Accounts & advisors

Banks / credit unions

Investment & retirement accounts

Attorney

Accountant / financial advisor

Insurance agent

◆ People to contact

Executor

Agent for finances

Agent for health care

◆ Other instructions

Digital accounts, safe-deposit box, or special wishes

REFERENCES & SOURCES

1. Tex. Est. Code § 251.051 (a will must be written, signed, and attested by two credible witnesses age 14 or older). statutes.capitol.texas.gov
2. Tex. Est. Code §§ 751.001, 752.051 (Durable Power of Attorney Act; statutory durable power of attorney form). statutes.capitol.texas.gov
3. Tex. Health & Safety Code §§ 166.151–166.164 (medical power of attorney). statutes.capitol.texas.gov
4. Texas Law Help, "Wills, Estate Planning and Probate." texaslawhelp.org
5. Texas Disciplinary Rules of Professional Conduct, Part VII (Rules 7.01–7.06). www.texasbar.com

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