

Who Will Fill My Shoes: Succession Planning for Landowners and Businesses

MODULE 3. LOCATING YOUR DOCUMENTS

This worksheet will record the location of important legal and financial documents such as deeds, titles, bank statements, insurance policies, and wills. This will help you and others locate the documents when needed.

Record the document and its general location here. This list will be useful later in the planning process.

Document	Location of document
Wills and trusts	
Medical records	
Durable power of attorney	
Birth certificates	
Marriage certificates/divorce papers	
Deeds	
Lease agreements	
Management plans	

Who Will Fill My Shoes: Succession Planning for Landowners and Businesses

Other Information	Details
Executor of will	
Funeral instructions	
Guardian	

Adapted from: Smith, K and Cushing, T. (2024). Keeping the Land: Succession Planning for Landowners. NC State Extension.