

Secure Will & Trust Storage

This playbook outlines best practices for securely storing important estate planning documents such as wills and trusts. It ensures these documents remain valid, protected from damage or loss, and accessible when required.

Step 1: **Select Storage**

Choose a secure, accessible location for storing your wills and trust documents. Options include a fireproof home safe, a bank safety deposit box, or with an attorney.

Step 2: **Notify Trustees**

Inform your trustees, executors, or family members about the location of your will and trust documents without necessarily disclosing the contents, ensuring they know where to find them when needed.

Step 3: **Security Measures**

Implement appropriate security measures to protect the documents from theft, fire, water damage, or other hazards. Use safes with security features appropriate to the document's value and privacy need.

Step 4: **Review Regularly**

Regularly review the storage conditions and security measures to ensure ongoing protection and to update documents as needed based on changes in circumstances or estate law.

Step 5: **Digital Copies**

Create digital copies of the will and trust documents. Store them in a secure, encrypted digital repository that trusted individuals can access if physical copies are lost or damaged.

Step 6: **Legal Compliance**

Ensure compliance with state laws regarding the storage of will and trust documents. Some jurisdictions require specific conditions for a will to be considered valid.

General Notes

Accessibility

While security is crucial, ensure that the chosen storage method does not impede timely access to the documents by authorized parties in the event of your incapacity or death.

Duplication

Avoid storing originals and copies in the same location to reduce the risk of simultaneous loss. Keep copies in a separate secure location if possible.

Legal Advice

Consider seeking advice from an estate attorney to assist with document storage, ensuring proper legal procedures are followed and reducing the risk of disputes.

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