



LOCATION # 1:	
LOCATION # 2:	

TYPE OF DOCUMENTS	DOCUMENT	#1	#2
ESTATE PLANNING	Trust Documents		
	Last Will & Testament		
	Estate Planning Letter(s)		
	Power(s) of Attorney		
	Health Care Documents		
	Living Will		
BUSINESS PAPERS	Partnership / LLC Agreements		
	Corporation Papers		
	Employment Agreements		
TAX RECORDS	State and Federal Income Tax Returns		
BANKING RECORDS	Checkbooks		
	Certificates of Deposit		
	Bank Statements and Canceled Checks		
	Credit Card Records		
INVESTMENT RECORDS	Stock and Bond Certificates		
	Brokerage Account Records		
	Annuity Contracts		
TITLE TO PERSONAL PROPERTY	Real Estate Deeds		
	Automobile Title		
	Boat / RV / Trailer Title		
	Other Personal Property		
	Other Personal Property		
PERSONAL PAPERS	Marriage Certificate		
	Birth Certificates		
	Military Records		
	Citizenship Papers		
	Divorce Judgments		
	Other		
	Other		
	Other		

Key Advisors to Be Contacted

Accountant

Phone _____ Firm _____

Address _____

Attorney

Phone _____ Firm _____

Address _____

Insurance Agent

Phone _____ Firm _____

Address _____

Bank

Phone _____ Bank _____

Address _____

Clergyman/Rabbi

Phone _____ Church/Synagogue _____

Address _____

Doctor

Phone _____ Firm _____

Address _____

Employer

Phone _____ Firm _____

Address _____

Financial Advisor

Phone _____ Firm _____

Address _____

Key Advisors to Be Contacted

Funeral Director

Phone _____ Firm _____

Address _____

General Insurance Agent

Phone _____ Firm _____

Address _____

Landlord

Phone _____ Firm _____

Address _____

Life Insurance Agent

Phone _____ Firm _____

Address _____

Partner

Phone _____ Firm _____

Address _____

Stockbroker

Phone _____ Firm _____

Address _____

Trust Officer

Phone _____ Institution _____

Address _____

Relatives and Close Friends to Be Contacted

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Life Insurance & Annuity Policies

Policy number and company _____

Type* _____ Insured _____

Owner _____ Date of Purchase _____

Primary beneficiary _____ Contingent beneficiary _____

Who pays premium† _____ Cash value _____

Amount of loans on policy _____ Face amount or death value _____

***Term, whole life, split dollar, group life, annuity.**

†Husband (H), Wife (W), Corporation (C).

Policy number and company _____

Type* _____ Insured _____

Owner _____ Date of Purchase _____

Primary beneficiary _____ Contingent beneficiary _____

Who pays premium† _____ Cash value _____

Amount of loans on policy _____ Face amount or death value _____

***Term, whole life, split dollar, group life, annuity.**

†Husband (H), Wife (W), Corporation (C).

Policy number and company _____

Type* _____ Insured _____

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Who pays premium† _____ Cash value _____

Amount of loans on policy _____ Face amount or death value _____

***Term, whole life, split dollar, group life, annuity.**

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