

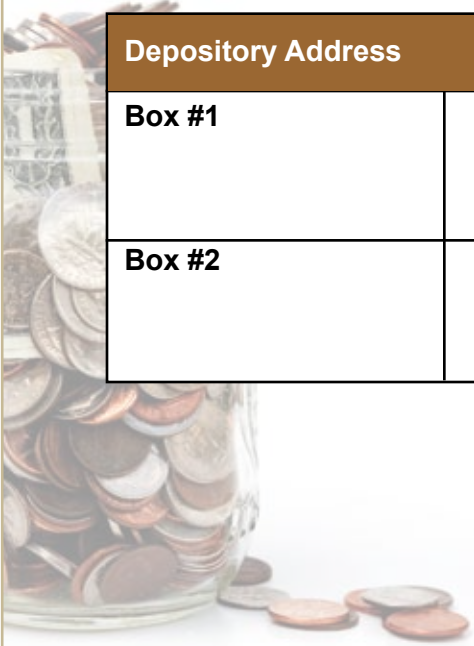
## 1. Personal Information & Documents

Family Member	Date of Birth	Social Security Number

Document	Location
Birth certificate	
Marriage license	
Passport	
Vaccination records	
Military discharge papers	
Divorce decree	
Power of Attorney	
Other	

## 2. Safe Deposit Boxes

Depository Address	Owner	Person with Power of Attorney	Contents
<b>Box #1</b>			
<b>Box #2</b>			



### 3. Bank Accounts

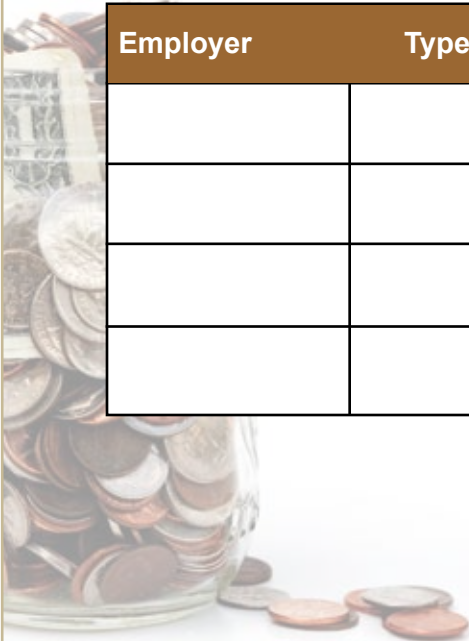
Bank Name	Account Type	Account Number	Location of Bank Records

### 4. Investments

Type <small>(Stock, Bond, Mutual Fund, etc.)</small>	Account Number	Number of Shares	Location of Account Statements

### 5. Employee Savings, Retirement or Stock Plans

Employer	Type of Plan	Value	Date of Valuation	Beneficiary



## 6. Real Estate Records

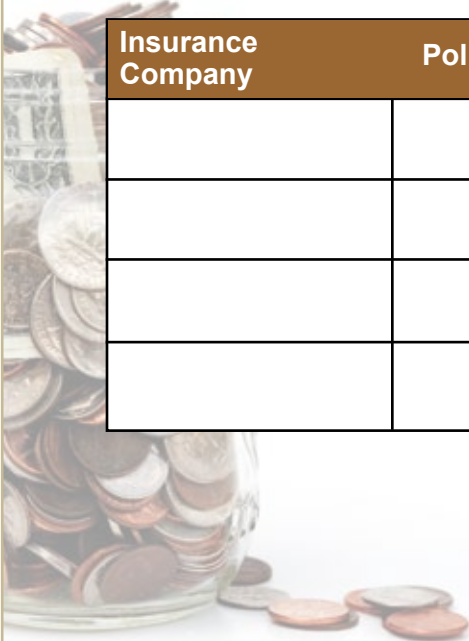
Property Address & Description	Location of Deed	Location of Property Tax Receipts	Name/Address of Mortgage Lender

## 7. Children's Accounts and Trusts

Child's Name	Type of Account or Trust	Where Funds Are Invested	Name & Address of Custodian or Trustee	Value

## 8. Life Insurance

Insurance Company	Policy #	Face Value	Beneficiaries	Location of Policy



### 9. Health Insurance

Insurance Company	Policy #	Type of Coverage	Location of Policy

### 10. Casualty Insurance (Homeowner's or Renter's, Auto, etc.)

Insurance Company	Policy #	Type of Coverage	Policy Limits	Agent & Phone

### 11. Income Tax Records

Return & Documents	Location
Current Year	
Last Year	
Prior Years	

### 12. Credit Cards and Loans

Type of Card or Loan	Issuer or Lender	Account Number	Location of Statements

### 13. Will

Attorney Name, Address & Phone Number	Executor Name, Address & Phone Number	Location of Will

### 14. Burial Plot

Cemetery	Location of Deed and Burial Instructions

### 15. Advisers

Type	Name	Address	Phone #
Attorney			
Stockbroker			
Tax Preparer			
Life Insurance Agent			
Financial Planner			
Other			

### 15. Additional Remarks

Attach an additional page here outlining any instructions that might be helpful to someone taking over your affairs.