



Important Documents and Contacts

In this section are several schedules for you to complete.

The location list provides a schedule to list where you keep your important documents, records, accounts and safe deposit box.

The family information schedule is important because it lists the current information of your immediate family.

There is also a schedule to list information regarding other relatives other than immediate family who should be contacted upon your death.

There is a schedule for information regarding your key advisors. It is important to have this information available to assist your Trustee/Executrix or Executor to assist you with the management of your estate.

Location of Important Papers

ESTATE PLANNING PORTFOLIO LOCATION (EPP): (VAULT)

LOCATION # 1:

LOCATION # 2:

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
ESTATE PLANNING DOCUMENTS	Living Trust			
	Trust Property Inventory			
	Pour-Over Will for Husband			
	Pour-Over Will for Wife			
	Property Agreement			
	Affidavit of Trust			
	Estate Planning Letter for Husband			
	Estate Planning Letter for Wife			
	Living Will for Husband			
	Living Will for Wife			
	Anatomical Gift for Husband			
	Anatomical Gift for Wife			
	Property Power of Attorney for Husband			
	Property Power of Attorney for Wife			
	Health Care Power of Attorney for Husband			
Health Care Power of Attorney for Wife				
BUSINESS PAPERS	Partnership Agreements			
	Corporation Papers			
	Employment Agreements			

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
TAX RECORDS	State and Federal Income Tax Returns			
	Gift Tax Returns			
	Estate Tax Returns			
BANKING RECORDS	Checkbooks			
	Passbooks			
	Certificates of Deposit			
	Bank Statements and Canceled Checks			
	Credit Card Records			
REAL ESTATE RECORDS	Real Estate Deeds			
	Title Insurance Policies			
	Notes and Loan Contracts			
	Rental Property Records			
INVESTMENT RECORDS	Stock and Bond Certificates			
	Year-end Investment Reports			
	Annuity Contracts			
	Limited Partnership Agreements			
TITLE TO PERSONAL PROPERTY	Automobile Title			
	Boat Title			
	Airplane 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 _____

Auto Insurance Agent _____

Phone _____ Firm _____

Address _____

Bank _____

Phone _____ Bank _____

Address _____

Clergyman/Rabbi _____

Phone _____ Church\Synagogue _____

Address _____

Doctor _____

Phone _____ Firm _____

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/Real Estate Salesperson _____

Phone _____ Firm _____

Address _____

Life Insurance Agent _____

Phone _____ Firm _____

Address _____

Partner _____

Phone _____ Firm _____

Address _____

Successor Trustee/Executor #1 _____

Phone _____ Firm _____

Address _____

Successor Trustee/Executor #2 _____

Phone _____ Institution _____

Address _____

Other _____

Phone _____ Firm _____

Address _____

Relatives and Close Friends to Be Contacted

Name _____

Relationship _____ Phone _____

Address _____

Name _____

Relationship _____ Phone _____

Address _____

Name _____

Relationship _____ Phone _____

Address _____

Name _____

Relationship _____ Phone _____

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