

PLEASE INDICATE THE LOCATION OF THE FOLLOWING ITEMS:

PERSONAL

Original Will (self) _____
Original Will (spouse) _____
Special Estate Instructions – Written _____
Special Estate Instructions – Video _____
Combination to Personal Safe _____
Bank Safe Deposit Box _____
Trust Documents _____
Power of Attorney _____
Health Care Power of Attorney _____
Living Will _____
Birth Certificate _____
Social Security Records _____
Military Records _____
Marriage Certificate _____
Divorce Papers _____
Naturalization Papers _____
Other, e.g., Adoption Papers _____

BUSINESS PROFESSIONAL

Partnership/LLC Documents _____
Corporate Document _____
Inventory of Business Assets _____
Buy Sell Documents _____
Pension Plans _____
Other Employee Retirement Benefits _____
(e.g., Nonqualified Deferred Compensation)

TAX RETURNS & RECORDS

Income Tax Returns _____
Property Tax Records _____
Gift Tax Returns _____

INSURANCE POLICIES

Life Insurance – Group _____
Life Insurance – Individual(s) _____
Property/Casualty _____
Umbrella Liability _____
Disability _____
Income Annuities _____
Long-Term Care Insurance _____
Medical Insurance _____
Dental Insurance _____
Auto Insurance _____

FINANCIAL ASSETS & LIABILITIES

Checking Accounts _____
Stock and Bond Certificates _____
Money Market Accounts _____
Savings Accounts _____
Certificates of Deposit _____
Credit Union Accounts _____
Securities Accounts _____
Mutual Fund Accounts _____
401(k) Accounts _____
Pension Plan Records _____
Mortgage and Home Equity Loans _____
Credit Card Accounts _____
Other Loans/Leases _____

OTHER INSTRUMENTS/PAPER

Original Deeds to Real Property _____
Automobile Titles _____
Affidavits Re: Domicile _____
Affidavits Re: Community Property _____
Affidavits Re: Separate Property _____
Funeral/Cremation Arrangements _____
Obituary Data _____
Address Book/Whom to notify _____