

Use this form to note where all important documents and personal information can be located. This information will make it much easier for your heirs to carry out your plans and wishes upon your death. Make sure important people in your life know where to find this list. Consider giving copies to at least one important person in your life who will assume responsibility for your estate.

Note: Don't place your will and life insurance policies in a safe deposit box. Your heirs may not have immediate access to it upon your death. Instead, put them in another safe place and consider giving a copy to a trusted friend or relative — possibly the executor of your will.

People

Name and phone number

ATTORNEY

EXECUTOR FOR YOUR WILL

FINANCIAL PLANNER

INSURANCE AGENT(s)

OTHER _____

Personal Information

Location

BIRTH CERTIFICATE

SOCIAL SECURITY CARD

MARRIAGE CERTIFICATE

DIVORCE PAPERS

LETTER OF INTENT

SAFE DEPOSIT BOX (location and key)

BURIAL INSTRUCTIONS

OTHER _____

Legal and Insurance Documents

Location

DURABLE POWER OF ATTORNEY

ADVANCE DIRECTIVES

WILL

TRUST AGREEMENT

GUARDIANSHIP PAPERS

INSURANCE POLICIES:

(Health, Disability, Life,

Homeowner's, Automobile)

OTHER _____

Financial Documents and Information

Location

MORTGAGE(s)

INVESTMENTS

RETIREMENT BENEFITS

BANK, CREDIT UNION, AND S&L ACCOUNTS

OTHER _____

Deeds and Titles

Location

HOUSE

AUTOMOBILE

OTHER PROPERTY

CEMETERY PLOT

OTHER _____
