This booklet is a tool to provide you with a clear, precise record of your personal and financial information. It can be used to prepare an estate plan and is also a convenient way of organizing information for your loved ones. You may wish to provide a copy to a family member and to your executor as a safeguard against loss.
PERSONAL INFORMATION

Date of Birth ________________________________

Birth Certificate □ Yes □ No  Located _________

Citizenship—date/place of naturalization if not US citizen by birth ______________________________

Social Security #______________________________

Father’s Full Name___________________________

Mother’s Full Name___________________________

Religious Affiliation___________________________

Place of Worship_____________________________

Address____________________________________

Marital Status

□ Single  □ Married  □ Widowed

□ Divorced □ Separated

Spouse’s Name______________________________

Date & State married ____________________________

Certificate located____________________________

Previous marriage □ Yes □ No

Date _________  Marriage ______________________

Marriage ended by □ Death □ Divorce

Children____________________________________

Name______________________________________

Address____________________________________

Children____________________________________

Name______________________________________

Address____________________________________

Military Service—Dates______________________

Service Serial #____________________________

Discharge papers located______________________

LIVING WILL DIRECTIVE & ORGAN DONATION

I have a living will directive stating my wishes for medical care and treatment. The document is dated ________ and located ______________________

Individuals having copies:

Name _____________________ Phone _________

Address ____________________________________

Name _____________________ Phone _________

Address ____________________________________

Name _____________________ Phone _________

Address ____________________________________

I have agreed to donate organs to (organization) __________________________

Papers are located _________________________

I have given the following person durable power of attorney which will go into effect upon my inability to act for myself

Name _____________________ Phone _________

Address ____________________________________

LAST WILL AND TESTAMENT

Will written _________ Located _______________

Executor of will_____________________________

Address____________________________________

Attorney____________________________________

Address____________________________________

In my will, I have left the following charitable bequests

Charity____________________________________

Bequest Amount____________________________

Charity____________________________________

Bequest Amount____________________________
FUNERAL AND BURIAL ARRANGEMENTS

I have given instructions regarding my funeral in
☐ Will  ☐ Letter  ☐ Other

I own  ☐ Cemetery plot  ☐ Cemetery vault  ☐ None

Name____________________________________

Location______________Section #____Plot #____

Location of Deed____________________________________

Other funeral arrangements___________________________________________

BANK ACCOUNTS AND SAFE DEPOSIT BOX

Bank Name_________________________________

☐ Checking  ☐ Savings  Account #_____________
☐ Joint  ☐ Individual

Bank Name_________________________________

☐ Checking  ☐ Savings  Account #_____________
☐ Joint  ☐ Individual

RETIRED ACCOUNTS

Company Name_________________________________

Address____________________________________

Account #____________________________________

Beneficiary____________________________________

Company Pension_________________________________

Social Security_________________________________

Indiv. Retirement Acct.________________________

Annuities____________________________________

Beneficiary(ies)_________________________________

Other Retirement Benefits_____________________

Beneficiaries____________________________________

INVESTMENTS

I own various stocks and bonds, held in street name, which are located at __________________________

___________________________________________

Stocks/Bonds/Mutual Funds

Company____________________________________

Shares___ Date Purchased_____ Cost Basis_____

Company____________________________________

Shares___ Date Purchased_____ Cost Basis_____

Company____________________________________

Shares___ Date Purchased_____ Cost Basis_____

Records of purchase and sale are located _________

___________________________________________

U.S. Savings Bonds—I own under the following ownership registrations  ☐ My name alone

☐ Joint with _______________

Type__________________ Face Value ___________

Issue Date______________ Maturity_____________

Serial Number_______________________________

Type__________________ Face Value ___________

Issue Date______________ Maturity_____________

Serial Number_______________________________

Certificates of Deposit _______________________

Amount_____________ Date of Redemption_______

Certificates of Deposit _______________________

Amount_____________ Date of Redemption_______

Certificates of Deposit _______________________

Amount_____________ Date of Redemption_______

Partnerships_________________________________

___________________________________________
TRUST FUNDS
Description of my Trusts_______________________
Testamentary Trust___________________________
Trustee_____________________________________
Assets in Trust_______________________________
Beneficiaries________________________________
Attorney of Record___________________________
Firm_______________________________________
Address____________________________________
Charitable Remainder Trust____________________
Trustee_____________________________________
Assets in the trust____________________________
Income Recipients____________________________
Charitable Beneficiaries_______________________
Papers are located____________________________
Existing Trust________________________________
I have created a trust for the benefit of __________
___________________________________________
Date established_____________________________
Trust Agreement located______________________
Attorney who drafted the Trust Agreement
___________________________________________
Firm_______________________________________
Address____________________________________

PERSONAL EMPLOYMENT
My Employer___________________________
Address________________________________
I participate in the following benefit plans________
___________________________________________
Other business interests_____________________
LIFE INSURANCE
All policies owned by me on my life
Insurance Company___________________________
Policy #_____________ Amt. of policy____________
Location____________________________________
Beneficiaries________________________________
Policies owned by others on my life (incl. charities)
___________________________________________
Policies which I own on the lives of others________
___________________________________________
Location
Person Insured_______________ Amount________
Address____________________________________
Insurance Agents or Brokers
Name______________________________________
Company___________________________________
Address_____________________ Ph.____________
Name______________________________________
Company___________________________________
Address_____________________ Ph.____________
I have unpaid loans against these policies
Policy #___________________ Amount Due_______
OTHER INSURANCE

Company___________________________________
Coverage___________________________________
Insurance Agent_____________________________
Phone_________________ Policy #_____________
Location of Policy___________________________________

RESIDENCE AND OTHER REAL ESTATE

Residence Address___________________________
___________________________________________
I own residence □ Yes □ No
Ownership title is held in
□ My name alone
□ Joint with_________________________________
Mortgage on property □ Yes □ No
Held by_________________________________________
Documents concerning this property located ______
___________________________________________
I own other real estate located at_______________
___________________________________________
Homeowner’s insurance broker_________________
Firm___________________ Phone______________
Address____________________________________

TANGIBLE PERSONAL PROPERTY

Automobile(s)_______________________________
Jewelry, Art, Antiques, Collectibles_______________
___________________________________________
___________________________________________
Complete Inventory of my personal property is located___________________________________________

PERSONAL DEBTORS AND CREDITORS

Name of Debtor____________________________________
Address____________________________________
Amount owed to me_____________________________
Name of Debtor____________________________________
Address____________________________________
Amount owed to me_____________________________
I have the following outstanding loans
Creditor____________________________________
Loan #_____________________________________
Amount of Loan_______ Date final Pyment_______
Creditor____________________________________
Loan #_____________________________________
Amount of Loan_______ Date final Pyment_______
Credit Card Debt
Company____________________________________
Account #___________________________________
Phone_____________________________________
Company____________________________________
Account #___________________________________
Phone_____________________________________

TAX RETURNS

My tax preparer______________________________
Firm_______________________________________
Address____________________________________
Phone_____________________________________
Copies of my income tax returns are located at_____
___________________________________________
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