

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Will:**

Date of Will: \_\_\_\_\_

Where is it? \_\_\_\_\_

Who drew it up? \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Who is the executor? \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Did you add any codicils? \_\_\_\_\_

When? \_\_\_\_\_

Where are they kept? \_\_\_\_\_

**Insurance:**

Do you have Life Insurance? \_\_\_\_\_

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Who is the beneficiary? \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

How are benefits to be paid?

Lump sum \_\_\_\_\_ Fixed installments \_\_\_\_\_

**Homeowner's Insurance** policy? \_\_\_\_\_

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address: \_\_\_\_\_

Phone# \_\_\_\_\_

**Health insurance** policy? \_\_\_\_\_

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

**Auto/accident insurance** policy? \_\_\_\_\_

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address \_\_\_\_\_

Phone # \_\_\_\_\_

**Social Security:**

Your SSN: \_\_\_\_\_

Spouse's SSN: \_\_\_\_\_

Children's SSN's \_\_\_\_\_

Receiving social security payments? \_\_\_\_\_

If yes, what kind/how much? \_\_\_\_\_

**Family Records:**

Where are your important documents kept? \_\_\_\_\_

Where is your marriage certificate? \_\_\_\_\_

Military records? (DD-214/discharge papers) \_\_\_\_\_

Citizenship Papers? \_\_\_\_\_

Birth certificate? \_\_\_\_\_

Passport? \_\_\_\_\_

Other Important Documents: \_\_\_\_\_

*For each bank account, indicate if a 'Payable on Death' (POD) or 'Transferable on Death' (TOD) is in place*

**Bank Accounts:**

**Checking Account #:** \_\_\_\_\_

Bank \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Present Balance: \_\_\_\_\_

**Savings Account #:** \_\_\_\_\_

Bank \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Present Balance: \_\_\_\_\_

**Any other bank accounts?**

Bank \_\_\_\_\_

Account #: \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Present Balance: \_\_\_\_\_

Bank \_\_\_\_\_

Account #: \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Present Balance: \_\_\_\_\_

*For each bank account, indicate if a 'Payable on Death' (POD) or 'Transferable on Death' (TOD) is in place*

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Business Interests:**

Are you employed by a company? \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Do you own a business? \_\_\_\_\_

What is the business name? \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Name of business partner(s) \_\_\_\_\_

Your percentage of business ownership: \_\_\_\_\_

Where are the contracts and important documents of the business kept? \_\_\_\_\_

Should survivor sell or continue the business? \_\_\_\_\_

Who should survivor rely on for business advice? \_\_\_\_\_

**Personal Property:**

Are the household goods insured?

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

What is their phone #? \_\_\_\_\_

What is their address? \_\_\_\_\_

Where are the title papers for the car? \_\_\_\_\_

Is there a loan on the car? \_\_\_\_\_

Name/Contact Info for car loan company: \_\_\_\_\_

Do you have a safe deposit box? \_\_\_\_\_

Bank \_\_\_\_\_

Account #: \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Present Contents: \_\_\_\_\_

Where is the key? \_\_\_\_\_

Do you have any stocks and bonds? \_\_\_\_\_

Where are they? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Broker's name, address and phone: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**U.S. Security And War Bonds:**

Do you own any of these bonds? \_\_\_\_\_

Does your spouse own any? \_\_\_\_\_

Are you designated as co-owner? \_\_\_\_\_

May survivor cash bonds without delay? \_\_\_\_\_

Do you have a list of bonds by serial number and denomination? \_\_\_\_\_

Where is that list? \_\_\_\_\_

**Real Estate:**

Do you own real estate? \_\_\_\_\_

Address: \_\_\_\_\_

Where do you keep the deed? \_\_\_\_\_

Is the property held jointly? \_\_\_\_\_

Name of joint owner: \_\_\_\_\_

Mortgage on this property? \_\_\_\_\_

Where is your copy of the mortgage? \_\_\_\_\_

Where do you keep payment records? \_\_\_\_\_

Name of mortgage lender: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Is the property insured?

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address: \_\_\_\_\_

Phone# \_\_\_\_\_

Where are the real estate tax records? \_\_\_\_\_

Do you own a cemetery plot? \_\_\_\_\_

Where? \_\_\_\_\_

Does your spouse own a cemetery plot? \_\_\_\_\_

Where? \_\_\_\_\_

Where are the cemetery plot deeds? \_\_\_\_\_

Own any other real estate? \_\_\_\_\_

Where? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*(continued on next page)*

**Real Estate (cont):**

**Address of additional real estate:**

Where do you keep the deed?  
\_\_\_\_\_

Is the property held jointly? \_\_\_\_\_

Name of joint owner: \_\_\_\_\_

Mortgage on this property? \_\_\_\_\_

Where is your copy of mortgage?  
\_\_\_\_\_

Where do you keep payment records?  
\_\_\_\_\_

Name of mortgage lender:  
\_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Is the property insured?

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address: \_\_\_\_\_

Phone# \_\_\_\_\_

Where are the real estate tax records?  
\_\_\_\_\_

**Address of additional real estate:**

Where do you keep the deed?  
\_\_\_\_\_

Is the property held jointly? \_\_\_\_\_

Name of joint owner: \_\_\_\_\_

Mortgage on this property? \_\_\_\_\_

Where is your copy of mortgage?  
\_\_\_\_\_

Where do you keep payment records?  
\_\_\_\_\_

Name of mortgage lender:  
\_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Is the property insured?

Company: \_\_\_\_\_

Policy # \_\_\_\_\_

Address: \_\_\_\_\_

Phone# \_\_\_\_\_

Where are the real estate tax records?  
\_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
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**Other Financial Records:**

Where are your income tax records?  
\_\_\_\_\_

Who is your financial advisor?  
\_\_\_\_\_

Who holds the note on your farm equipment?

Name \_\_\_\_\_

Account #: \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Original debt/date of debt \_\_\_\_\_

Present Balance: \_\_\_\_\_

Monthly payment: \_\_\_\_\_

Where do you keep the payment records?  
\_\_\_\_\_

**People you owe money to:**

**Name of creditor:** \_\_\_\_\_

**Account #:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Original debt/date of debt \_\_\_\_\_

Present Balance: \_\_\_\_\_

Monthly payment: \_\_\_\_\_

Where do you keep the payment records?  
\_\_\_\_\_

**Name of creditor:** \_\_\_\_\_

**Account #:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Original debt: \_\_\_\_\_

Present Balance: \_\_\_\_\_

Monthly payment: \_\_\_\_\_

Where do you keep the payment records?  
\_\_\_\_\_

**People who owe you money:**

**Name of Debtor:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone # \_\_\_\_\_

Original debt: \_\_\_\_\_

How much do they owe you? \_\_\_\_\_

Where do you keep the payment records?  
\_\_\_\_\_