

## ESTATE PLANNING DOCUMENT LOCATOR

	Last Update _____							
	HOME FILING CABINET	SAFE DEPOSIT BOX	PLACE OF BUSINESS	HOME SAFE	FINANCIAL PLANNER / BROKER	CPA / TAX ADVISOR	ATTORNEY	OTHER
List of persons to be notified in an emergency								
Letter of final requests								
Will - original document and codicils								
Trust documents								
Living will / health care surrogate / power of attorney								
Birth & marriage certificates								
Death certificates of family members								
Preuptial agreements and/or divorce decree								
Social Security cards and other information								
Insurance policies								
Passbooks, certificates, etc.								
Recent tax returns								
Stock and bond certificates								
Other investment certificates								
Business papers								
Receivables - proof of indebtedness								
Deeds and proof of ownership								
Mortgages - proof of indebtedness								
Home improvement documents								
Coins, stamps and/or collections								
Duplicate keys for home / vehicle								
Passports								
Anatomical Gift Act authorization								
Other								
Other								

*Is your house in order?*

## PEOPLE INVOLVED IN MY ESTATE

Last Update \_\_\_\_\_

Advisors	Name and phone number
Personal Representative / Executor	
Alternate Personal Representative	
Guardian	
Alternate Guardian	
Preferred attorney to handle estate	
Alternate attorney to handle estate	
Health care professional	
Health care professional	
Financial planner	
Investment advisor	
CPA / Tax advisor	
Bank Branch	
Insurance agent, personal	
Insurance agent, property	
Real estate broker	
Other	
Other	

To be notified in the event of death	Name and phone number
Funeral home / society	Prepaid Plan <input type="checkbox"/> YES <input type="checkbox"/> NO
Religious advisor	
Key acquaintance	
Key acquaintance	
Civic / Fraternal organizations	
Professional organizations	
Charitable organizations	
Newspapers	
Obituary prepared	<input type="checkbox"/> YES <input type="checkbox"/> NO                      Location:
Other	
Other	
List of additional names attached	<input type="checkbox"/> YES <input type="checkbox"/> NO

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