

PERSONAL RECORDS

MY FULL LEGAL NAME

First Name Middle Name Last Name

LEGAL RESIDENCE

Street _____

City _____

State _____ Zip Code _____

BIRTH CERTIFICATE

It is located at _____

I was born on _____
(Date)

In _____
(City) (State)

MARRIAGE CERTIFICATE

Is located at _____

DIVORCE RECORDS (IF APPLICABLE)

Are located at _____

OTHER PERTINENT MARRIAGE DATA

SOCIAL SECURITY

My social security number is _____

The card is located at _____

CITIZENSHIP/NATURALIZATION PAPERS

Copies of my citizenship/naturalization papers are located at

MILITARY SERVICE

Branch of service _____

Dates served _____

My VA disability claim number _____

The location of my discharge papers _____

FAMILY DATA

Names and addresses of spouse, children and immediate relatives:

CONTACT LIST (NAME, E-MAIL ADDRESS, PHONE NUMBER)

Attorney _____

Accountant/Tax Advisor _____

Broker _____

Financial Advisor _____

Insurance Company _____

Religious Leader _____

CHECKING ACCOUNTS

I have the following checking accounts:

(1) Bank _____

Account Number _____

Joint Owner _____

(2) Bank _____

Account Number _____

Joint Owner _____

The following person has power to sign checks for me:

Name _____

Address _____

SAVINGS ACCOUNTS

I have the following savings accounts:

(1) Bank _____

Account Number _____

Joint Owner _____

(2) Bank _____

Account Number _____

Joint Owner _____

(3) Bank _____

Account Number _____

Joint Owner _____

My bank books and bank records are located at:

Major cash gifts I have previously made to my children:

CREDIT UNION ACCOUNTS

I am a member of the following credit unions:

(1) Name _____

Account Number _____

(2) Name _____

Account Number _____

U.S. SAVING OR GOVERNMENT BONDS

I own U.S. Savings Bonds under the following ownership registrations:

_____ My name alone

_____ Co-owner with _____

I am beneficiary at death of _____

At my death, beneficiary is _____

The Bonds are located at _____

A list of Bonds and their serial numbers is located at:

SAFE DEPOSIT BOXES

I have a safe deposit box _____ Yes _____ No

(1) Box Location _____ Box Number _____

Key Location _____

(2) Box Location _____ Box Number _____

Key Location _____

This box is held jointly with:

Name _____

Address _____

The following person has access to my safe deposit box:

Name _____

Address _____

CERTIFICATES OF DEPOSIT

I have the following certificates of deposit:

Financial Institution

Certificate No.

SECURITIES

I own various stocks and bonds which are located at:

Records of purchase and sale are located at:

Some of my securities were acquired by gift or inheritance Yes No

Papers concerning these securities are located at:

The following securities are pledged against loans:

They are held by:

Name _____

Address _____

My Stockbroker is:

Name _____

Address _____

CREDIT CARDS AND OTHER DEBTS

I possess the following credit cards:

Company	Card/Account Number	Amount	Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PERSONAL DEBTORS AND CREDITORS

The following owe money to me _____

I owe to the following _____

Copies of notes, loan agreements, and receipts are located at:

BUSINESS MATTERS

My present business or employment _____

Name of Company _____

Address _____

I have the following financial interest in this business:

Form of business

_____ Partnership _____ Corporation

_____ Sole Proprietorship _____ Other _____

EMPLOYEE SAVINGS/PENSION/RETIREMENT PLANS

I possess the following plans:

(a) Name and Address of Employer _____

Value of Plan _____

Type of Plan _____

Contact Information _____

(b) Name and Address of Employer _____

Value of Plan _____

Type of Plan _____

Contact Information _____

(c) Name and Address of Employer _____

Value of Plan _____

Type of Plan _____

Contact Information _____

Papers concerning business connections and agreements are located at:

TAX RECORDS

Copies of my income tax returns are located at _____

Receipts, canceled checks, and tax worksheets to support these returns are located at _____

FINANCIAL POWER OF ATTORNEY

I _____ have _____ have not executed a power of attorney

My power of attorney is dated _____

I have named _____
(Name of Person) (Address)

as power of attorney.

LIVING WILL _____ Yes _____ No

If yes, it is located at _____

DNR ORDER

I have a Do Not Resuscitate (DNR) order _____ Yes _____ No

If yes, it is located at _____

TRUST

I have established a living trust for the benefit of _____

The trust was established on _____

The trust agreement is located at _____

The trustees are _____

The attorney who drafted the trust agreement is:

Name _____

Address _____

LAST WILL AND TESTAMENT

The original executed copy of my will is located at

The date of the will is _____

I have the following disability income insurance protection:

Policy Number/Certificate Number

Company

Benefits Amount

LIFE INSURANCE POLICIES AND ANNUITIES

Information concerning my SBP or Civil Service Survivors Benefits is located at:

I own the following policies on my life:

(a) Policy Number _____

Company _____

Principal Amount _____

(b) Policy Number _____

Company _____

Principal Amount _____

(c) Policy Number _____

Company _____

Principal Amount _____

(d) Policy Number _____

Company _____

Principal Amount _____

(e) Policy Number _____

Company _____

- Principal Amount _____
- (f) Policy Number _____
- Company _____
- Principal Amount _____
- (g) Policy Number _____
- Company _____
- Principal Amount _____
- (h) Policy Number _____
- Company _____
- Principal Amount _____

These policies and any supporting papers are located at:

Companies, organizations, or others holding insurance policies on my life:

- (1) Owner _____ Amount _____
- Beneficiary _____
- (2) Owner _____ Amount _____
- Beneficiary _____
- (3) Owner _____ Amount _____
- Beneficiary _____

My principal life insurance adviser is:

Name _____

Address _____

I have policies n the lives of:

(a) Name _____

Address _____

Company _____ Amount _____

(b) Name _____

Address _____

Company _____ Amount _____

(c) Name _____

Address _____

Company _____ Amount _____

(d) Name _____

Address _____

Company _____ Amount _____

(e) Name _____

Address _____

Company _____ Amount _____

Location of these policies _____

I have made loans against some of the policies _____ Yes _____ No

Borrowed from _____

I also own annuity contracts _____ Yes _____ No

(1) Contract Issued _____ Amount _____

Location of Contract _____

(2) Contract Issued _____ Amount _____

Location of Contact _____

CURRENT RESIDENCE AND OTHER REAL ESTATE

My residence address is _____

I own my residence _____ Yes _____ No

Ownership title is held in _____

My name along _____

OTHER REAL ESTATE

(1) Street _____

City _____

State _____

Zip Code _____

(2) Street _____

City _____

State _____

Zip Code _____

Location of deeds, insurance and other related documents _____

AUTOMOBILE

Make, model & year _____

Tag number _____

Located at _____

Title located at _____

License registration located at _____

Insurance Company _____

OTHER VEHICLES AND EQUIPMENT (SUCH AS BOATS, TRUCKS, RECREATIONAL VEHICLES,
AIRCRAFT, FARM EQUIPMENT)

Location	Title located at	Insurance Company
_____	_____	_____
_____	_____	_____
_____	_____	_____

HOUSEHOLD FURNISHINGS (ATTACH LIST)

Located at _____

FURS (ATTACH LIST)

Located at _____

JEWELRY (ATTACH LIST)

Located at _____

OTHER VALUABLES (STAMP COLLECTIONS, COIN COLLECTIONS, RARE BOOKS, ART, ANTIQUES, ETC.;
ATTACH LIST)

Located at _____

Insurance policies for fire, theft, or liability on this property are located at

Bills of sale or other evidences of ownership are located at

The following tangible personal property is owned by me jointly with:

Name _____

Address _____

(1) Property _____

Location _____

(2) Property _____

Location _____

Joint names with

There is a mortgage on this property held by _____

The following specified papers:

_____ Deed

_____ Copy of Mortgage

_____ Title Insurance Policy

_____ Title Abstract

_____ Surveys

_____ Closing Statements

_____ Insurance Policies

_____ Tax Receipts

_____ Leases

_____ Building Cost Figures

are located at _____

CEMETERY PLOT

I own a plot in the following cemetery:

Name _____

Address _____

The deed to the plot is located at _____

I have given instructions regarding my funeral in:

_____ My Will

_____ A Letter

_____ Other