

INFORMATION

FOR MY EXECUTOR

The information in this
booklet will be helpful
in settling my estate.

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My Full Legal Name

(First Name)

(Middle Name)

(Last Name)

Legal Residence

Street _____

City _____

State _____

Zip Code _____

Other Residences

Street _____

City _____

State _____

Zip Code _____

Street _____

City _____

State _____

Zip Code _____

Last Will and Testament

The original executed copy of my Will is located at

The date of the Will is _____

My Will names as executor and trustees

(name)

(address)

(name)

(address)

(name)

(address)

As guardians of my children, my Will names

(name)

(address)

(name)

(address)

The Lawyer who drew my Will is

(name)

(address)

Trusts

I have established a living trust for the benefit of

The trust was established on _____ / _____
(month) (year)

The trust agreement is located at _____

The trustees are

The attorney who drafted the trust agreement is

(name)

(address)

PERSONAL RECORDS

Birth Certificate

It is located at _____

I was born in _____
(city) (state)

Date of Birth _____

Marriage Certificate

It is located at _____

Other Pertinent Marriage Data

SOCIAL SECURITY

My Social Security Number is _____ - _____ - _____

The card is located at _____

TAX RECORDS

Copies of my income tax returns are located at

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

MILITARY SERVICE

My service serial number was _____

My VA disability claim number is _____

My discharge papers are located at _____

SAFE DEPOSIT BOXES

I have a safe deposit box Yes _____ No _____

(box location) (box number)

(key location)

(box location) (box number)

(key location)

This box is held jointly with

(name)

(address)

This box is held jointly with

(name)

(address)

This box is registered in a name other than my own, that name being

(name)

(address)

The following person has access to my safety deposit box

(name)

(address)

CREDIT CARDS

I possess the following credit cards

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

(company)

(card number)

CHECKING ACCOUNTS

I have the following checking accounts

Bank _____

Account Number _____

Joint Owner _____

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

Bank _____

Account Number _____

Joint Owner _____

Bank _____

Account Number _____

Joint Owner _____

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

Name _____

Account Number _____

Name _____

Account Number _____

LIFE INSURANCE POLICIES AND ANNUITIES

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)

These policies and any supporting papers are located at:

Companies, organizations or others holding insurance policies on my life

Owner _____

Amount _____

Beneficiary _____

Owner _____

Amount _____

Beneficiary _____

Owner _____

Amount _____

Beneficiary _____

I have policies on the lives of

(a)

(name)

(address)

(company)

(amount)

(b)

(name)

(address)

(company)

(amount)

(c)

(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 _____

(contract issued by)

(amount)

(location of contract)

(contract issued by)

(amount)

(location of contract)

My principal life insurance adviser is

(name)

(address)

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 Stock Broker is

Name _____

Address _____

U.S. SAVINGS 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

PERSONAL PROPERTY

I own the following types of tangible personal property

Automobile

Located at _____

Title located at _____

License registration location at _____

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 evidence of ownership are located at

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

Name _____

Address _____

Property _____

Location _____

RESIDENCE AND OTHER REAL ESTATE

My residence address is

I own my residence Yes _____ No _____

Ownership title is held in

My name alone _____

Joint names with

There is a mortgage held on this property

Held by _____

The following specified papers:

- | | |
|------------------------------|-----------------------------|
| _____ Deed | _____ Closing Statements |
| _____ Copy of Mortgage | _____ Insurance Policies |
| _____ Title Insurance Policy | _____ Tax Receipts |
| _____ Title Abstract | _____ Leases |
| _____ Surveys | _____ Building cost figures |

are located at

I own other real estate located at (address)

Documents regarding properties 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 Proprietor

_____ Other

My firm has the following pension, retirement or death benefit plans in which I am a participant

Type of Plan

Value

Beneficiary
(If any)

Papers concerning business connections and agreements are located at

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

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

NOTES