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ATTORNEY AT LAW

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Document Locator

Name: _____ Date: _____

Personal Documents (Indicate Location, if None or Not Applicable, so state.)

Original Will: _____

Spouse's Will: _____

Special Estate Instructions: _____

Funeral Instructions: _____

Cemetery Plot Papers: _____

Combination to Safe: _____

Bank Safe Deposit Box: _____

Trust Documents: _____

Power of Attorney: _____

Health Care Power of Attorney: _____

Living Will: _____

Birth Certificate: _____

Marriage Certificate: _____

Divorce Papers: _____

Other (Adoption, Medical, Military, Naturalization, etc.): _____

Business & Professional (Location, if None or Not Applicable so state)

Partnership/LLC Documents: _____

Corporate Documents: _____

Buy/Sell Agreements: _____

Pension Plans: _____

Other Employee Benefits: _____

Other: _____

Tax Returns and Records (Location, if None or Not Applicable so state)

Income Tax Returns: _____

Gift Tax Returns: _____

Tax Basis for Property: _____
(Real Estate, Stocks, Bonds, etc)

Insurance Policies (Location, Contact Info, if None so state)

Life Insurance: _____

Homeowners: _____

Umbrella Liability: _____

Disability/Business Overhead: _____

Income Annuities: _____

Long-Term Care: _____

Medical: _____

Other (Accident, Disease, Boat, etc) : _____

Financial Assets (Location, Account Numbers, if None so state)

Checking Accounts: _____

Savings Accounts: _____

Money Market Accounts: _____

Certificates of Deposit: _____

Securities Accounts: _____

Mutual Fund Accounts: _____

Retirement Accounts: _____

Other: _____

Miscellaneous Instruments:

Original Deeds to Real Property: _____

Mortgages, Loans, Leases: _____

Personal Loans: _____

Auto Loans: _____

Titles (Car, Boats): _____

Others (Affidavits, Agreements): _____

Names and Telephone Numbers of Personal and Professional Advisors

Attorney: _____

Accountant: _____

Insurance Agent: _____

Investment Advisor: _____

Clergy: _____

Physician: _____

Executor of Estate: _____

Next of Kin (and addresses) : _____

Other: _____