



Estate & Gift Plan Location Sheet

(1 of 2)

Make sure you give a completed copy of this form to your executor, trustee, your estate planning attorney, and/or family members. In the event of serious illness or death, your Estate Plan Location Sheet™ can save everyone involve much time and money. You should not place any confidential information in the location sheet such as social security numbers, pass words, or other personal financial information that a dishonest person could use against you. Your Estate Plan Location Sheet™ should only explain where you keep your important information. Your important information should be kept properly secured.

LOCATION

PRIMARY DOCUMENTS & ITEMS

Will(s)

Yours _____

Spouse's/Partner's _____

Trust(s)

Final Letter to Spouse

Yours _____

Spouse's/Partner's _____

Divorce Records

Yours _____

Spouse's/Partner's _____

Adoption Records

Yours _____

Spouse's/Partner's _____

Net Worth Statement

Life Insurance Policies

Total Amount of Insurance

Total Number of Policies

Safe Deposit Box(es)

Copy of Statements

Business Agreements

Other Valuables

Birth Certificate(s)

Yours _____

Spouse's/Partner's _____

Child(ren)'s _____

Marriage Certificate

Citizenship Papers

Yours _____

Spouse's/Partner's _____

APPOINTMENTS

Executor

Yours _____

Spouse's/Partner's _____

Email _____

Phone _____

Trustee

Yours _____

Spouse's/Partner's _____

Email _____

Phone _____

Email _____

Phone _____

Guardian of the Person

Email _____

Phone _____

Guardian of the Property

Email _____

Phone _____

DPA - Financial Management

Yours _____

Spouse's/Partner's _____

Email _____

Phone _____

Email _____

Phone _____

Email _____

Phone _____

Advance Health Care Directive

Yours _____

Spouse's/Partner's _____

Email _____

Phone _____

Email _____

Phone _____



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OTHER ITEMS OF IMPORTANCE

Current Employer

Yours _____

Spouse's/Partner's _____

Social Security Number

Yours _____

Spouse's/Partner's _____

Security Codes

Yours _____

Spouse's/Partner's _____

Military Service Number

Yours _____

Spouse's/Partner's _____

Funeral Home

Yours _____

Spouse's/Partner's _____

Burial Instructions

Yours _____

Spouse's/Partner's _____

Organ/Body Donations

Yours _____

Spouse's/Partner's _____

LOCATION

FAMILY, FRIENDS & PROFESSIONAL ADVISORS

Child(ren) _____ Email _____ Phone _____

Child(ren) _____ Email _____ Phone _____

Child(ren) _____ Email _____ Phone _____

Parents/In-laws _____ Email _____ Phone _____

Parents/In-laws _____ Email _____ Phone _____

Close Friends _____ Email _____ Phone _____

Close Friends _____ Email _____ Phone _____

Close Friends _____ Email _____ Phone _____

Close Friends _____ Email _____ Phone _____

Accountant _____ Email _____ Phone _____

Attorney _____ Email _____ Phone _____

Banker _____ Email _____ Phone _____

Casualty Insurance Agent _____ Email _____ Phone _____

Financial Advisor _____ Email _____ Phone _____

Financial Insurance Agent _____ Email _____ Phone _____

Financial Planner _____ Email _____ Phone _____

Investment Advisor _____ Email _____ Phone _____

Stock Broker _____ Email _____ Phone _____

Trustee _____ Email _____ Phone _____