

Estate & Gift Plan Location Sheet



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 involved time and money. You should not place any confidential information on the location sheet such as social security numbers, passwords, or other personal financial information. Your Estate Plan Location Sheet™ should only explain where you keep your important information and should be kept properly secured.



PRIMARY DOCUMENTS & ITEMS

Will(s) **LOCATION**
 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 _____ *Email* _____ *Phone* _____
 Spouse's/Partner's _____ *Email* _____ *Phone* _____

Trustee
 Yours _____ *Email* _____ *Phone* _____
 Spouse's/Partner's _____ *Email* _____ *Phone* _____

Guardian of the Person _____ *Email* _____ *Phone* _____

Guardian of the Property _____ *Email* _____ *Phone* _____

DPA - Financial Management
 Yours _____ *Email* _____ *Phone* _____
 Spouse's/Partner's _____ *Email* _____ *Phone* _____

Advance Health Care Directive
 Yours _____ *Email* _____ *Phone* _____
 Spouse's/Partner's _____ *Email* _____ *Phone* _____

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OTHER ITEMS OF IMPORTANCE

Current Employer

LOCATION

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

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