

ESTATE ORGANIZER

Copies of Documents

of

Location of original documents: _____

Prepared by:

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GENERAL INFORMATION TO OUR FAMILY

1) Miscellaneous:

a) Our safe deposit box is located at:

b) The keys to the safe deposit box are located at:

c) Someone else's property is in our safe deposit box _____'s property is identifiable as:

d) We have someone else's property in our possession. _____'s property is identifiable as:

e) Our personal safe is located at:

f) Our tax records are located at:

g) Other:

2. Advisors:

We suggest that you complete this section in pencil so that changes can be made as necessary.

Name	Address	Telephone
*Personal Representative(s)		
*Trustee(s)		
Attorney		
Doctor		
Religious Advisor		
Guardian		
CPA		
Insurance Agent		
Stockbroker		

* Other than Husband or Wife

GENERAL INFORMATION TO MY FAMILY

From husband

1) Directions for memorial services:

2) Burial wishes

My body should be buried in _____ cemetery located, _____

My body should be cremated and the ashes _____

My body should be donated to _____

Other, specify _____

3) Specific comments, wishes, thoughts

GENERAL INFORMATION TO MY FAMILY

From wife

1) Directions for memorial services:

2) Burial wishes

My body should be buried in _____ cemetery located, _____

My body should be cremated and the ashes _____

My body should be donated to _____

Other, specify _____

3) Specific comments, wishes, thoughts

SPECIFIC LIST OF ASSETS

It would be very helpful to your family if this list is kept up-to-date.

Keep copies of all deeds with this page.

Location of originals: _____

Real estate

Address	Type of property

SCHEDULE OF LIFE INSURANCE/TAX-DEFERRED ANNUITIES

Include copies of the face page of insurance policies.

Location of originals: _____

Company	Person insured	Beneficiary designations	
		Primary	Contingent

Life insurance (include accidental death policies)

Annuities

SCHEDULE OF TAX-DEFERRED INVESTMENTS

Include copies of the face page of policies, agreements, etc.

Location of originals:

Company	Beneficiary designations	
	Primary	Contingent
Pension		
Profit		
Sharing		
I.R.A.'S		
Keoghs		
Tax-deferred		
Annuities		
Other		