

## Location of Important Papers

LOCATION #1:	
LOCATION # 2:	
LOCATION # 3:	

TYPE OF DOCUMENTS	DOCUMENT	LWPP	#1	#2
ESTATE PLANNING DOCUMENTS	TRUST			
	Trust Property Inventory			
	Pour-Over Will			
	Pour-Over Will			
	Property Agreement			
	Certificate of Trust			
	Estate Planning Letter			
	Estate Planning Letter			
	Property Power of Attorney			
	Property Power of Attorney			
	Health Care Documents			
	Health Care Documents			
	HIPAA			
	HIPAA			
BUSINESS PAPERS	Partnership Agreements			
	Corporation Papers			
	Employment Agreements			
TAX RECORDS	State and Federal Income Tax Returns			
	Gift Tax Returns			
	Estate Tax Returns			
BANKING RECORDS	Checkbooks			
	Passbooks			
	Certificates of Deposit			
	Bank Statements and Canceled Checks			
	Credit Card Records			

TYPE OF DOCUMENTS	DOCUMENT	LWPP	#1	#2
INVESTMENT RECORDS	Stock and Bond Certificates			
	Brokerage Account Records			
	Annuity Contracts			
	Limited Partnership Agreements			
TITLE TO PERSONAL PROPERTY	Automobile Title			
	Boat Title			
	Airplane Title			
	Other Personal Property			
	Other Personal Property			
PERSONAL PAPERS	Marriage Certificate			
	Birth Certificates			
	Military Records			
	Citizenship Papers			
	Divorce Judgments			
	Other			
	Other			
	Other			

# Key Advisors to Be Contacted

## Accountant

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Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Attorney

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Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Auto Insurance Agent

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Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Bank

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Phone \_\_\_\_\_ Bank \_\_\_\_\_

Address \_\_\_\_\_

## Clergyman/Rabbi

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Phone \_\_\_\_\_ Church/Synagogue \_\_\_\_\_

Address \_\_\_\_\_

## Doctor

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Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Employer

---

Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Financial Advisor

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## Financial Advisor

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Phone \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_

## Relatives and Close Friends to Be Contacted

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

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Address \_\_\_\_\_

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

**Name**

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Relationship \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

# DIGITAL ASSETS AND PASSWORDS

Name: \_\_\_\_\_

Cell phone: \_\_\_\_\_ Password: \_\_\_\_\_

## Primary Residence:

Address: \_\_\_\_\_

Tel.: \_\_\_\_\_ Voicemail Password: \_\_\_\_\_

Security system: Company \_\_\_\_\_ Tel. \_\_\_\_\_ Password \_\_\_\_\_

Home safe location and combination: \_\_\_\_\_

## Vacation Residence:

Address: \_\_\_\_\_

Tel.: \_\_\_\_\_ Voicemail Password: \_\_\_\_\_

Security system: Company \_\_\_\_\_ Tel. \_\_\_\_\_ Password \_\_\_\_\_

Home safe location and combination: \_\_\_\_\_

## Business:

Name and address \_\_\_\_\_

Tel.: \_\_\_\_\_ Voicemail Password: \_\_\_\_\_

## Computers:

Desktop location, username, and password: \_\_\_\_\_

Laptop location, username, and password: \_\_\_\_\_

**Email Accounts:**

Provider	Email Address	Password
<i>Gmail</i>	_____	_____
<i>Hotmail</i>	_____	_____
<i>Yahoo</i>	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Social Networking:**

Site	Username	Password
<i>Facebook</i>	_____	_____
<i>LinkedIn</i>	_____	_____
<i>Twitter</i>	_____	_____
_____	_____	_____
_____	_____	_____

**Telecommunications, etc.:**

Site	Username	Password
<i>Skype</i>	_____	_____
<i>AOL IM</i>	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Financial Accounts** (banks, brokerages, credit card companies, etc.):

Institution	Web Address	Username	Password
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Institution Expiry	ATM / Credit Card Number	PIN / Security Code /
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**e-Commerce Accounts:**

Site	Username	Password
<i>PayPal</i>	_____	_____
<i>eBay</i>	_____	_____
<i>Craigslist</i>	_____	_____
<i>Amazon</i>	_____	_____
_____	_____	_____
_____	_____	_____



**Online Storage Accounts:**

Site	Username	Password
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

**Domain Names, etc.:**

Name/Registrar	Username	Password
<hr/>	<hr/>	<hr/>
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**Other Online Accounts:**

Site	Username	Password
<i>Flickr</i>	<hr/>	<hr/>
<i>YouTube</i>	<hr/>	<hr/>
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