



Personal Inventory & Records Book

An inventory is the
first step in a prop-
er estate plan.

This booklet is a tool to provide you with a clear, precise record of your personal and financial information. It can be used to prepare an estate plan and is also a convenient way of organizing information for your loved ones. You may wish to provide a copy to a family member and to your executor as a safeguard against loss.

PERSONAL INFORMATION

Date of Birth _____

Birth Certificate Yes No Located _____

Citizenship—date/place of naturalization if not US citizen by birth _____

Social Security # _____

Father’s Full Name _____

Mother’s Full Name _____

Religious Affiliation _____

Place of Worship _____

Address _____

Marital Status

Single Married Widowed

Divorced Separated

Spouse’s Name _____

Date & State married _____

Certificate located _____

Previous marriage Yes No

Date _____ Marriage _____

Marriage ended by Death Divorce

Children _____

Name _____

Address _____

Children _____

Name _____

Address _____

Military Service—Dates _____

Service Serial # _____

Discharge papers located _____

LIVING WILL DIRECTIVE & ORGAN DONATION

I have a living will directive stating my wishes for medical care and treatment. The document is dated _____ and located _____

Individuals having copies:

Name _____ Phone _____

Address _____

Name _____ Phone _____

Address _____

Name _____ Phone _____

Address _____

I have agreed to donate organs to (organization) _____

Papers are located _____

I have given the following person durable power of attorney which will go into effect upon my ability to act for myself

Name _____ Phone _____

Address _____

LAST WILL AND TESTAMENT

Will written _____ Located _____

Executor of will _____

Address _____

Attorney _____

Address _____

In my will, I have left the following charitable bequests

Charity _____

Bequest Amount _____

Charity _____

Bequest Amount _____

FUNERAL AND BURIAL ARRANGEMENTS

I have given instructions regarding my funeral in

Will Letter Other

I own Cemetery plot Cemetery vault None

Name _____

Location _____ Section # _____ Plot # _____

Location of Deed _____

Other funeral arrangements _____

BANK ACCOUNTS AND SAFE DEPOSIT BOX

Bank Name _____

Checking Savings Account # _____

Joint Individual

Bank Name _____

Checking Savings Account # _____

Joint Individual

Bank Name _____

Checking Savings Account # _____

Joint Individual

RETIREMENT ACCOUNTS

Company Name _____

Address _____

Account # _____

Beneficiary _____

Company Pension _____

Social Security _____

Indiv. Retirement Acct. _____

Annuities _____

Beneficiary(ies) _____

Other Retirement Benefits _____

Beneficiaries _____

INVESTMENTS

I own various stocks and bonds, held in street name, which are located at _____

Stocks/Bonds/Mutual Funds

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Records of purchase and sale are located _____

U.S. Savings Bonds—I own under the following ownership registrations My name alone

Joint with _____

Type _____ Face Value _____

Issue Date _____ Maturity _____

Serial Number _____

Type _____ Face Value _____

Issue Date _____ Maturity _____

Serial Number _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Partnerships _____

TRUST FUNDS

Description of my Trusts _____

Testamentary Trust _____

Trustee _____

Assets in Trust _____

Beneficiaries _____

Attorney of Record _____

Firm _____

Address _____

Charitable Remainder Trust _____

Trustee _____

Assets in the trust _____

Income Recipients _____

Charitable Beneficiaries _____

Papers are located _____

Existing Trust _____

I have created a trust for the benefit of _____

Date established _____

Trust Agreement located _____

Attorney who drafted the Trust Agreement

Firm _____

Address _____

I am a beneficiary under a Trust established by _____

Papers are located _____

PERSONAL EMPLOYMENT

My Employer _____

Address _____

I participate in the following benefit plans _____

Other business interests _____

LIFE INSURANCE

All policies owned by my on my life

Insurance Company _____

Policy # _____ Amt. of policy _____

Location _____

Beneficiaries _____

Policies owned by others on my life (incl. charities)

Policies which I own on the lives of others _____

Location

Person Insured _____ Amount _____

Address _____

Insurance Agents or Brokers

Name _____

Company _____

Address _____ Ph. _____

Name _____

Company _____

Address _____ Ph. _____

I have unpaid loans against these policies

Policy # _____ Amount Due _____

OTHER INSURANCE

Company _____
Coverage _____
Insurance Agent _____
Phone _____ Policy # _____
Location of Policy _____

RESIDENCE AND OTHER REAL ESTATE

Residence Address _____

I own residence Yes No

Ownership title is held in

My name alone

Joint with _____

Mortgage on property Yes No

Held by _____

Documents concerning this property located _____

I own other real estate located at _____

Homeowner's insurance broker _____

Firm _____ Phone _____

Address _____

TANGIBLE PERSONAL PROPERTY

Automobile(s) _____

Jewelry, Art, Antiques, Collectibles _____

Complete Inventory of my personal property is lo-
cated _____

PERSONAL DEBTORS AND CREDITORS

Name of Debtor _____

Address _____

Amount owed to me _____

Name of Debtor _____

Address _____

Amount owed to me _____

I have the following outstanding loans

Creditor _____

Loan # _____

Amount of Loan _____ Date final Pyment _____

Creditor _____

Loan # _____

Amount of Loan _____ Date final Pyment _____

Credit Card Debt

Company _____

Account # _____

Phone _____

Company _____

Account # _____

Phone _____

TAX RETURNS

My tax preparer _____

Firm _____

Address _____

Phone _____

Copies of my income tax returns are located at _____

PERSONAL ADVISORS

Physician _____
Address _____
Specialty _____ Phone _____
Physician _____
Address _____
Specialty _____ Phone _____
Clergy person _____
Address _____
Phone _____
Attorney _____
Address _____
Phone _____
Accountant _____
Address _____
Phone _____
Insurance Agent _____
Address _____
Phone _____
Trust Officer _____
Address _____
Phone _____
Investment Broker _____
Address _____
Phone _____
Other _____
Address _____
Phone _____

LOCATION OF IMPORTANT PAPERS

Vital Statistics _____
Trust Agreements _____
Last Will & Testament _____
Bonds and Securities _____
Bank Books _____
Insurance Policies _____
Business Agreements _____
Titles and Deeds _____
Tax Papers _____
Charitable Documents _____
Military Service Documents _____
Others _____