

Collecting Vital Information

This checklist will help you and/or your parents start organizing important information which should be collected and kept in a safe and convenient place. On completing the items in this checklist, copies of the checklist should be given to the people who will be involved in settling the estate (i.e.: executor, financial planner and attorney).

General

Name _____

Social Security Number _____

Important names and phone numbers

Clergyman _____

Attorney _____

Accountant _____

Stockbroker _____

Financial planner _____

Insurance Agent _____

Relatives, close friends _____

Account number & locations (ie: home safe deposit box, bank) of key documents

Estate

Wills, letters of instruction for self and spouse _____

Powers of attorney _____

Special bequests _____

Burial instructions _____

Cemetery plot deeds _____

Financial

Pension _____

Employment contracts _____

Partnership Agreements _____

Checking accounts _____

Savings accounts _____

Bank accounts _____

Canceled checks _____

Credit cards and numbers _____

CDs _____

Checkbooks _____

Savings passbooks _____

Investment Securities list _____

Brokerage accounts _____

Stock certificates _____

Mutual fund shares _____

Bonds _____

Savings bonds _____

Individual retirement accounts _____

Keogh plan _____

401-k information _____

Annuity contracts _____

Stock option plan _____

Real Estate

Title insurance _____

Rental property information _____

Mortgages _____

Deeds _____

Other _____

Insurance

Life group _____

Life-individual _____

Other death benefits _____

Property & Casualty _____

Liability _____

Health _____

Dental _____

Homeowners _____

Automobile _____

Other _____

Personal and family

Trust agreements _____

Birth certificates _____

Naturalization papers _____

Adoption papers _____

Marriage certificate _____

Divorce/separation records _____

Military records _____

Organizational memberships _____

Safe combination: home _____

Safe combination: business _____

List of valuable possessions _____

Auto ownership title _____

Boat ownership _____

Social security cards _____

Drivers license numbers _____

Other _____
