

Who to Contact

Role	Name	Phone Number	Email Address
<i>Financial Advisor</i>			
<i>Attorney</i>			
<i>Accountant</i>			
<i>Funeral Director</i>			
<i>Spiritual Director</i>			
<i>Family</i>			
<i>Friends</i>			
<i>Employer</i>			
<i>Other</i>			

Important Documents

Types of Documents	Where Are They Located?
<i>Wills</i>	
<i>Trusts</i>	
<i>Powers of Attorney</i>	
<i>Net Worth Statement</i>	
<i>Real Estate Deeds</i>	
<i>Marriage Certificate/ Divorce Decree</i>	
<i>Tax Returns</i>	
<i>Safe Deposit Box</i>	
<i>- Which Bank? Where is the key?</i>	
<i>Car Title</i>	
<i>Military Records</i>	
<i>Loan Documents</i>	
<i>Prepaid Funeral Paperwork</i>	
<i>Other</i>	

Insurance Policies

Company	Location	Approx. Value	Beneficiaries

Company Benefits

Type	Contact	Approx. Value	Online Access URL	User ID / Password
<i>Stock Options</i>				
<i>Restricted Stock</i>				
<i>Deferred Comp</i>				

Accounts | Taxable

Type	Locations	Account Number	Approx. Value	Online Access URL	User ID / Password
<i>Brokerage</i>					
<i>Checking</i>					
<i>CDs</i>					

Accounts | Retirement

Type	Locations	Account Number	Approx. Value	Beneficiary	Online Access URL	User ID / Password
<i>IRA</i>						
<i>401(k)</i>						
<i>Annuity</i>						

Accounts | Kids

Type	Locations	Account Number	Approx. Value	Online Access URL	User ID / Password
<i>529</i>					
<i>UTMA/UGMA</i>					

Computer / Tablet / Smartphone

Type of Device	Location	User ID	Password

