

Location of Important Papers

ESTATE PLANNING PORTFOLIO (EPP) LOCATION:	
LOCATION # 1:	
LOCATION # 2:	

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
ESTATE PLANNING	Living Trust			
	Trust Property Inventory			
	Pour-Over Will(s)			
	Property Agreement			
	Certificate of Trust			
	Estate Planning Letter(s)			
	Property Power of Attorney(s)			
	Health Care Documents			
	HIPAA Form(s)			
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			
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			

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
PERSONAL PAPERS	Marriage Certificate			
	Birth Certificates			
	Military Records			
	Citizenship Papers			
	Divorce Judgments			
	Other			
	Other			
	Other			

Retirement Assets
IRA, 401k, 403b, 457, Pension Plans

Whose retirement asset: _____

Account Information and Company: _____

Contact information: _____

Total cash value: _____ Monthly amount: _____

Primary beneficiary _____ Contingent beneficiary _____

Whose retirement asset: _____

Account Information and Company: _____

Contact information: _____

Total cash value: _____ Monthly amount: _____

Primary beneficiary _____ Contingent beneficiary _____

Whose retirement asset: _____

Account Information and Company: _____

Contact information: _____

Total cash value: _____ Monthly amount: _____

Primary beneficiary _____ Contingent beneficiary _____

Whose retirement asset: _____

Account Information and Company: _____

Contact information: _____

Total cash value: _____ Monthly amount: _____

Primary beneficiary _____ Contingent beneficiary _____

Long Term Care Insurance Policies

Policy number and company: _____

Insured: _____

Policy Effective Date: _____

Lifetime Maximum Benefit: _____

Nursing Facility Maximum Daily Benefit: _____

Home and Community-Based Care Maximum Daily Benefit: _____

Medical Equipment Lifetime Maximum Benefit: _____

World Wide Coverage Benefit Lifetime Maximum Benefit: _____

Other information: _____



Policy number and company: _____

Insured: _____

Policy Effective Date: _____

Lifetime Maximum Benefit: _____

Nursing Facility Maximum Daily Benefit: _____

Home and Community-Based Care Maximum Daily Benefit: _____

Medical Equipment Lifetime Maximum Benefit: _____

World Wide Coverage Benefit Lifetime Maximum Benefit: _____

Other information: _____

Key Advisors to Be Contacted

Accountant

Phone _____ Firm _____

Address _____

Attorney

Phone _____ Firm _____

Address _____

Auto Insurance Agent

Phone _____ Firm _____

Address _____

Bank

Phone _____ Bank _____

Address _____

Clergyman/Rabbi

Phone _____ Church/Synagogue _____

Address _____

Doctor

Phone _____ Firm _____

Address _____

Employer

Phone _____ Firm _____

Address _____

Financial Advisor

Phone _____ Firm _____

Address _____

Key Advisors to Be Contacted

Funeral Director

Phone _____ Firm _____

Address _____

General Insurance Agent

Phone _____ Firm _____

Address _____

Landlord

Phone _____ Firm _____

Address _____

Life Insurance Agent

Phone _____ Firm _____

Address _____

Partner

Phone _____ Firm _____

Address _____

Stockbroker

Phone _____ Firm _____

Address _____

Trust Officer

Phone _____ Institution _____

Address _____

Relatives and Close Friends to Be Contacted

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Name

Relationship _____ Phone _____

Address _____

Digital Assets

Financial/Bank Account			
Username/email		Password	
Website			
Username/email		Password	
Website			
Username/email		Password	
Website			
Email			
Username/email		Password	
Username/email		Password	
eCommerce (Online shopping account information)			
Username/email		Password	
Website			
Username/email		Password	
Website			
Username/email		Password	
Website			
Social Media			
Username/email		Password	
Website			
Username/email		Password	
Website			
Other			
Username/email		Password	
Website			
Username/email		Password	
Website			