

INFORMATION REGARDING IMPORTANT DOCUMENTS

The documents listed below are very important and are often needed when you are not available or not able to tell others where to find them. If you have executed any of the following documents, please provide me with a copy or give its current location. If you don't know, take time now to find it or give enough information about it so that someone else can find it when needed. If the document does not apply to you, put "n/a" next to it.

ESTATE PLANNING DOCUMENTS

Document	Location
WILL	
<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

If yes, please provide me with a copy.

Document	Location
TRUST	
<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

If yes, please provide me with a copy.

Document	Location
DURABLE POWER OF ATTORNEY FOR ASSET MANAGEMENT	
<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

If yes, please provide me with a copy.

Document	Location
POWER OF ATTORNEY FOR HEALTH CARE (ADVANCE DIRECTIVE), DIRECTIVE TO PHYSICIAN and/or LIVING WILL	
<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

If yes, please provide me with a copy.

If any powers of attorney have been granted by you to another:

- Date: _____
- Holder of power: _____
- State where executed: _____
- Special powers granted or withheld: _____
- Location of original(s): _____
- Number of originals executed: _____

OTHER DEATH-RELATED DOCUMENTS

Document	Location
FUNERAL AND BURIAL ARRANGEMENTS	_____

Document	Location
CEMETERY PLOT and DEED TO PLOT	_____

Document	Location
ORGAN DONATION DIRECTIONS	_____

PERSONAL DOCUMENTS

Document	Location
BIRTH CERTIFICATE	_____
MARRIAGE CERTIFICATE	_____

DIVORCE DECREE	_____
PREMARITAL AGREEMENTS (Please provide me with copies)	_____
COMMUNITY PROPERTY AGREEMENT(S) (please provide me with copies)	_____
MARITAL PROPERTY AGREEMENT(S) (please provide me with copies)	_____
NATURALIZATION OR CITIZENSHIP DOCUMENTS	_____
PASSPORT	_____
YOUR CHILDREN'S BIRTH CERTIFICATES	_____
YOUR CHILDREN'S ADOPTION PAPERS	_____
PET INFORMATION SHEETS	_____
MILITARY SERVICE RECORDS (DISCHARGE PAPERS)	_____
EMPLOYMENT RECORDS	_____
TAX RETURNS	Location
COPIES OF INCOME TAX RETURNS	_____
COPIES OF GIFT TAX RETURNS	_____
ASSET AND LIABILITY RELATED DOCUMENTS	Location
BROKERAGE STATEMENTS	_____
STOCK CERTIFICATES AND BONDS (Not held in a brokerage acct)	_____
DEED TO RESIDENCE and/or VACATION HOME	_____
LEASE TO RESIDENCE	_____
CREDIT CARD INFORMATION LIST (issuers and account numbers)	_____

INSURANCE POLICIES

Location

LIFE INSURANCE POLICIES

PROPERTY INSURANCE POLICIES

DISABILITY INSURANCE POLICY
