

INFORMATION FOR MY EXECUTOR/AGENT

I. LOCATION OF ESTATE PLANNING DOCUMENTS

A. Will:

B. Trust:

C. Durable General Power of Attorney:

D. Advance Medical Directive:

E. Funeral/Disposition of My Remains:

II. LOCATION OF FINANCIAL RECORDS/SAFE DEPOSIT BOX

A. Bank and Investment Accounts:

B. Deeds, Mortgages and Loans:

C. Income Tax Returns:

D. Safe Deposit Box:

E. Insurance Policies (Life, Long-Term Care, Disability, etc.):

F. Online/Internet Accounts and Passwords List:

III. OBITUARY/DEATH CERTIFICATE INFORMATION

A. Full Name:

B. Date of Birth:

C. Birthplace:

D. Father's Name:

E. Mother's Maiden Name:

F. Citizenship:

G. Social Security Number:

H. Education Completed: Elementary/Secondary (0-12) _____ Years of College (1-4, 5+)

I. Marital Status: Single Married Divorced Widowed

If Married, Spouse's Name:

If Widowed, Name and Date of Death of Spouse:

J. Military Service:

K. Usual or Last Occupation:

Attach more detailed information for an obituary: awards, honors; employment/profession history; military involvement and distinctions; religious affiliations; civil, service and professional organizations; children, siblings, and close relatives; etc.