

Location of Important Papers

ESTATE PLANNING PORTFOLIO LOCATION: (EPP)

LOCATION # 1:

LOCATION # 2:

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
ESTATE PLANNING DOCUMENTS	Living Trust			
	Trust Property Inventory			
	Pour-Over Will for Husband			
	Pour-Over Will for Wife			
	Property Agreement			
	Affidavit of Trust			
	Estate Planning Letter for Husband			
	Estate Planning Letter for Wife			
	Living Will for Husband			
	Living Will for Wife			
	Anatomical Gift for Husband			
	Anatomical Gift for Wife			
	Property Power of Attorney for Husband			
	Property Power of Attorney for Wife			
	Health Care Power of Attorney for Husband			
Health Care Power of Attorney for Wife				
BUSINESS PAPERS	Partnership Agreements			
	Corporation Papers			
	Employment Agreements			
TAX RECORDS	State and Federal Income Tax Returns			
	Gift Tax Returns			
	Estate Tax Returns			
	Checkbooks			

TYPE OF DOCUMENTS	DOCUMENT	EPP	#1	#2
BANKING RECORDS	Passbooks			
	Certificates of Deposit			
	Bank Statements and Canceled Checks			
	Credit Card Records			
REAL ESTATE RECORDS	Real Estate Deeds			
	Title Insurance Policies			
	Notes and Loan Contracts			
	Rental Property 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			
PERSONAL PAPERS	Marriage Certificate			
	Birth Certificates			
	Military Records			
	Citizenship Papers			
	Divorce Judgments			
	Other			
	Other			
	Other			

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 _____

Hospital

Address

Employer

Phone _____

Firm

Address

Financial Advisor

Phone _____

Firm