



**RETIREMENT PLANS: 401Ks, IRA'S, etc.:**

<b>Financial Institution</b>	<b>Account No.</b>	<b>Name of Beneficiary</b>

**EMPLOYEE BENEFIT PLANS/STOCK OPTIONS**

\_\_\_\_\_  
\_\_\_\_\_

**REAL ESTATE OWNED**

<b>Address</b>	<b>Title: trust, joint tenancy, ect.</b>	<b>Mortgages</b>

**BUSINESSES / PARTNERSHIPS OWNED:** \_\_\_\_\_

\_\_\_\_\_

Buy-Sell Agreement: Yes: \_\_\_\_\_ No: \_\_\_\_\_

Business Succession Plan: Yes: \_\_\_\_\_ No: \_\_\_\_\_

**WILL AND HEALTH CARE DOCUMENTS:**

Date of Will/Trust: \_\_\_\_\_

Date of Living Will or Powers Of Attorney: \_\_\_\_\_

Location of Estate Planning Documents: \_\_\_\_\_

**Safe Deposit Box: Location:** \_\_\_\_\_ **Box Number:** \_\_\_\_\_ **Key Location:** \_\_\_\_\_

**COLLECTIBLES OWNED:** \_\_\_\_\_

\_\_\_\_\_

Appraisals: \_\_\_\_\_

**LOCATION OF FINANCIAL RECORDS:** \_\_\_\_\_

**SPECIAL INSTRUCTIONS TO FAMILY/FRIENDS:**

