



An Estate Planning Guide

1. ESTATE PLAN – (add another sheet as necessary)
My Will/Living Trust

 Location

 Attorney Date of Last Update

I have a separate list of personal items to distribute: NO YES Location _____

Name of Executor/Trustee Named in My Will

 Name Phone/e-mail

 Name Phone/e-mail

2. Important Documents – (add another sheet as necessary) Location of:

 Birth Certificate Marriage Certificate

 Children's Birth Certificates

 Advance Directive Durable Power of Attorney for Healthcare Durable Power of attorney for Finances

 Divorce Decree

Income Tax Records

 Accountant Address Phone/Web site/e-mail

 City State Zip

 Social Security Number Special S.S.I. Benefits

Veteran Benefits NO YES

 VA Claim Number Location of Discharge Document

IRA/KEOGH/401(k)/403(b)/Pension Plan

 Type Custodian

 Address Phone/Web site/e-mail

 City State Zip

 Type Custodian

 Address Phone/Web site/e-mail

 City State Zip

3. Assets – (add another sheet as necessary)**Life Insurance Policies**

Name	Policy Number	
Company	Agent	
Address	Phone/Web site/e-mail	
City	State	Zip
Owner	Amount	

Location of Policy Information

Commercial Annuities

Company Name	Contract Name	
Address	Phone/Web site/e-mail	
City	State	Zip

Real Estate

Real Estate Owned

Location of Deed, Mortgage and Documents

Insurance Company Name

Address	Phone/Web site/e-mail	
City	State	Zip

Location of Policy

Automobile Insurance Policy

Company Name	Policy Number	
Address	Phone/Web site/e-mail	
City	State	Zip

Bank Accounts

Bank Name		
Address	Phone/Web site/e-mail	
City	State	Zip
Account Type	Number	

Certificates of Deposit

Bank Name

Address

Phone/Web site/e-mail

City

State

Zip

Account Type

Number

Bank Name

Address

Phone/Web site/e-mail

City

State

Zip

Account Type

Number

Safe Deposit Box

Number

Bank Name

Address

Phone/Web site/e-mail

City

State

Zip

Securities/Mutual Funds

Broker Name

Address

Phone/Web site/e-mail

City

State

Zip

Location of Stock Certificates

Broker Name

Address

Phone/Web site/e-mail

City

State

Zip

Location of Stock Certificates

Government Bonds

Business/Other Assets

4. Memorial Service/Funeral Plan – (add another sheet as necessary)

Basic Instructions

Burial Cremation Other _____

Preferred Funeral Home

Address _____ Phone/Web site/e-mail _____

City _____ State _____ Zip _____

Service Location

Church/Temple Funeral Home Other _____

Flowers

Hymns/Songs

Pallbearers

Scripture Readings

Other Readings

Church/Temple Information

Name

Address _____ Phone/Web site/e-mail _____

City _____ State _____ Zip _____

Officiant

Other People to Contact

Name _____ Relationship _____ Phone/e-mail _____

Name _____ Relationship _____ Phone/e-mail _____

Name _____ Relationship _____ Phone/e-mail _____

Memorial Contributions

I would like gifts to be directed in my memory to the following organizations/charities:

_____ Name

_____ Name

_____ Name

This information is not professional legal, tax, or financial advice. Please consult your legal and financial advisor(s). This **Estate Planning Guide** is provided courtesy of Doorstep, Inc., 1119 SW 10th Ave., Topeka, KS 66604. **It is only intended to be a useful tool for you in your estate planning.**