

Name: \_\_\_\_\_

**LOCATION OF DOCUMENTS**

DOCUMENTS IN MY HOME ARE LOCATED:

DOCUMENTS IN MY OFFICE ARE LOCATED:

MY SAFE DEPOSIT BOX (S.D.B) IS LOCATED:

**MY CURRENT WILL OR TRUST (DATED: \_\_\_\_\_)**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**INCOME TAX RETURNS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**BIRTH CERTIFICATES/CITIZENSHIP PAPERS/PASSPORT**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**SOCIAL SECURITY DOCUMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**MARRIAGE DOCUMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**DEEDS AND OTHER REAL ESTATE DOCUMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**INVESTMENTS/STOCKS/BONDS/BANKING**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**BUSINESS AGREEMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**OUTSTANDING LOAN/CREDITOR DOCUMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**CREDIT CARDS/PERSONAL VALUABLES**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**MILITARY RECORDS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**INSURANCE/BENEFITS DOCUMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**FUNERAL ARRANGEMENTS**

Home  Office  S.D.B.  N/A  Other: \_\_\_\_\_

**ADVISORS TO CONSULT OR NOTIFY**

**ACCOUNTANT**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**FINANCIAL ADVISOR & COMPANY**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**LAWYER**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**BANK MANAGER**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**EXECUTOR OR TRUSTEE**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**LIFE UNDERWRITER**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**DOCTOR**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**CLERGY**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**CHILDREN'S GUARDIAN**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**OTHER**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**OTHER**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_



**Payne Nickles & Company, CPAs**

Website: [www.pncpa.biz](http://www.pncpa.biz)

Norwalk Office: (800) 860-0152

Sandusky Office: (800) 293-2727