

# *My Estate*

## Information Archive for My Family

*Estate of*

*Date*

# *My Estate*

## Personal Information

Date

Name	Birthdate	Social Security Number

Documents	Location
Birth Certificate	
Marriage License	
Military Discharge	
Passport	
Will, Power of Attorney, Medical Directive	
ID Cards	
Medical Insurance Cards	
Keys	
Burial Plot	
Medication	



# *My Estate*

## Document Location

Date

<b>Bank Documents</b>	<b>Location</b>	<b>Notes</b>

  

<b>Titles &amp; Deeds</b>	<b>Location</b>	<b>Notes</b>

  

<b>Credit Cards</b>	<b>Location</b>	<b>Notes</b>

  

<b>Tax Returns</b>	<b>Location</b>	<b>Notes</b>

# *My Estate*

## Document Location

Date

<b>Investments</b>	<b>Location</b>	<b>Notes</b>

  

<b>Trust &amp; Power of Attorney</b>	<b>Location</b>	<b>Notes</b>

  

<b>Mortgage &amp; Loan</b>	<b>Location</b>	<b>Notes</b>

  

<b>Personal Documents</b>	<b>Location</b>	<b>Notes</b>

# *My Estate*

## Insurance

Date

<b>Life Insurance</b>	<b>Account No. &amp; Contact</b>	<b>Policy Location</b>

  

<b>Health Insurance</b>	<b>Account No. &amp; Contact</b>	<b>Policy Location</b>

  

<b>Auto Insurance</b>	<b>Account No. &amp; Contact</b>	<b>Policy Location</b>

  

<b>Home &amp; Other Insurance</b>	<b>Account No. &amp; Contact</b>	<b>Policy Location</b>

# *My Estate*

## Banking

Date \_\_\_\_\_

Savings	Contact	Account Number

Notes

Checking	Contact	Account Number

Notes

Certificate of Deposit	Contact	Account Number

Notes









# *My Estate*

## Insurance

Date \_\_\_\_\_

<b>Medical Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Dental Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Long Term Disability</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Life Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

# *My Estate*

## Insurance

Page Two

<b>Homeowners/Rental Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Auto Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Personal Property Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

<b>Other Insurance</b>	<b>Contact</b>	<b>Account Number</b>

Notes

# *My Estate*

## Pensions & IRAs

Date

<b>Pensions</b>	<b>Company &amp; Contact</b>	<b>Account Number</b>	<b>Date of Payment</b>

  

<b>401(k) or 403(b) Plans</b>	<b>Company &amp; Contact</b>	<b>Account Number</b>	<b>Document Location</b>

  

<b>Roth IRAs</b>	<b>Company &amp; Contact</b>	<b>Account Number</b>	<b>Document Location</b>

  

<b>SEP &amp; Others</b>	<b>Company &amp; Contact</b>	<b>Account Number</b>	<b>Document Location</b>

# *My Estate*

## Notes

Topic -







# My Estate

## Potential Assets to Consider

Asset Types	Describe What You Have
Cash	
Pension & Social Security	
Savings Bonds	
Annuity	
IRA (Required Minimum Distribution) & Total Value	
Savings Accounts	
Checking Accounts	
Mutual Funds	
Stocks & Bonds	
House	
Vehicles	
Jewelry	
Real Estate	
Boat, RV, Motorcycle, other	
Art	
Furniture	
Art	
Other	