

ESTATE INFORMATION GUIDE

Name: _____ Social Security # _____

Date of Birth: _____ Place of Birth: _____

Spouse's Name: _____ Social Security # _____

Date of Birth: _____ Place of Birth: _____

Date of Marriage: _____ Place of Marriage: _____

Children:

Name	DOB	SS#	Address
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Creditors:

Name	Acct #	Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Utilities/Monthly Services:

Name	Acct#	Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Bank/Investment Accounts:

Bank Name	Acct#	Phone	Type of Account

Insurance Policies:

Company Name	Policy #	Agent Name/Phone#	Beneficiary

Do You Have...?

It is located where...?

Y N Living Will	
Y N Durable Power of Attorney	
Y N Medical Power of Attorney	
Y N Will	
Y N Marriage Certificates	
Y N Birth Certificates	
Y N Divorce Decrees	
Y N Death Certificates	
Y N Adoption Papers	
Y N Car Registration/Titles	
Y N Insurance Policies	
Y N Real Estate Deeds	
Y N Investments/bonds	
Y N Tax Returns	
Y N Safe Deposit Box	
Y N Military Service Info (DD214)	
Y N Medical Records	
Y N Dental Records	
Y N Organ Donor Card	
Y N Social Security Documents	
Y N Medicare Documents	
Y N VA Benefits/Documents	
Y N List of internet passwords	

