

SPECIFIC LIST OF ASSETS

It would be very helpful to your family if this list is kept up-to-date.

Keep copies of all deeds and titles with this section.

Location of originals: _____

REAL ESTATE Primary Residence and Time Share Properties		
ADDRESS	TYPE OF PROPERTY	BENEFICIARY DESIGNATION

TITLED PROPERTY Includes Cars, Trucks, Campers, Boats, Motorcycles, Mobile Homes, Etc.				
YEAR	MAKE	MODEL	STATE	BENEFICIARY DESIGNATION

Keep copies of all statements with this section.

Location of originals: _____

STOCK, BROKERAGE ACCOUNTS, MUTUAL FUNDS			
NAME OF CORPORATION	NAME & ADDRESS OF BROKER AGENT	ACCOUNT OR CERTIFICATE #	BENEFICIARY DESIGNATION

BONDS			
BOND TYPE	NAME & ADDRESS OF AGENT	BOND OR ACCOUNT NUMBER	BENEFICIARY DESIGNATION

ESTATE ORGANIZER
SCHEDULE OF OTHER TYPES OF INSURANCE

Keep copies of the front page of insurance policies with this section.

Location of originals: _____

TYPE	COMPANY	TYPE & AMOUNT OF BENEFITS
INSURANCE		
AUTO		
HOMEOWNERS		
OTHER LIABILITY		
LONG TERM CARE		
OTHER		
INVESTMENTS		
PENSION		
PROFIT SHARING		
IRA		
IRA		
IRA		
IRA		