

Client's name _____

Location of personal records and documents:

Listing the location of personal records and documents will expedite the estate administration process and reduce the likelihood of an item being overlooked or improperly handled. If these items cannot be located, there may be additional expense and delay when your estate is administered.

ITEM	LOCATION
Original Last Will and Testament . . .	_____
Letter of Direction	_____
Original Enduring Power of Attorney .	_____
Health Care Directive	_____
Organ/tissue donation card	_____
Pre-planned funeral contract	_____
Instructions regarding pets	_____
Credit cards.	_____
Debit cards	_____
Insurance policies	_____
Safe deposit box	_____
Box # _____	Keys are kept _____
Previous years' income tax returns. .	_____
Bank account records	_____
Pension plans or annuities.	_____
Investment information	_____
Real estate titles	_____
Mortgage/loan information	_____
Time share contracts	_____

ITEM

LOCATION

Birth certificate	_____
Passport/citizenship papers	_____
Social insurance card	_____
Marriage certificate(s)	_____
Marriage contract	_____
Cohabitation contract	_____
Divorce decree/separation agreement	_____
Health insurance card	_____
Driver's license	_____
Vehicle registration	_____
Incentive cards (i.e. Air Miles, etc.) .	_____
Medical/dental information	_____
Social networking sites	_____
Passwords held at	_____

Other

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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