



MY ESTATE INFORMATION

Keep this document updated annually and store it where your executor/trustee can find it

Last Updated

PERSONAL INFORMATION

Full Legal Name

Social Security Number

Date of Birth

Current Address

Phone

Email

IMPORTANT PEOPLE

Spouse/Partner

Full Legal Name

Social Security Number

Date of Birth

Phone

Email

Children

1st Name

Date of Birth

2nd Name

Date of Birth

3rd Name

Date of Birth

4th Name

Date of Birth

Executor/Successor Trustee/Personal Representative

Full Legal Name

Relationship

Phone

Email

Successor Trustee (if different from executor)

Full Legal Name

Relationship

Phone

Email

Power of Attorney (Durable/Financial)

Name

Phone

Email

Healthcare Proxy/Medical Power of Attorney

Name

Phone

Email

PROFESSIONAL ADVISORS

Role	Name	Firm/Company	Phone	Email
Estate Attorney				
Financial Advisor				
CPA/Tax Preparer				
Real Estate Agent				
Insurance Agent				

LEGAL DOCUMENTS

Document Type	Location
Will	
Trust Documents (Type: _____)	
Power of Attorney	
Healthcare Directive/Living Will	

FINANCIAL ACCOUNTS

List all accounts where you have deposits or investments

Bank Accounts

Institution	Contact Phone	Account Type	Account Number	Approx. Balance	Beneficiary

Investment/Brokerage Accounts

Institution	Contact Phone	Account Type	Account Number	Approx. Balance	Beneficiary

Retirement Accounts

401(k)/403(b)

Employer	Record Keeper	Approx. Balance	Primary Beneficiary	Contingent Beneficiary

IRA (Traditional or Roth)

Institution	Contact Phone	Account Number	Approx. Balance	Primary Beneficiary	Contingent Beneficiary

Pension

Former Employer	Contact	Phone	Beneficiary

INSURANCE POLICIES

Include policy numbers and beneficiary information for all policies

Life Insurance

Company	Policy Number	Agent Name	Agent Phone	Death Benefit	Primary Beneficiary	Contingent Beneficiary

Other Insurance

Type	Company	Contact Phone	Policy Number	Notes
Long-Term Care				
Disability				
Homeowner's /Property				
Auto				

REAL ESTATE

Include all properties owned

Property Address	Approx. Value	Ownership Type	Deed Location	Mortgage Lender	Lender Contact Phone	Mortgage Account #	Approx. Balance

VEHICLES

Make/Model /Year	VIN	Title Location	Loan/Lease Company	Contact Phone	Account Number

BUSINESS INTERESTS

Business 1

Business Name

Ownership %

Business Attorney

Type (LLC, Corporation, Partnership, etc.)

Business Partners

Operating Agreement Location

Business 2

Business Name

Ownership %

Business Attorney

Type (LLC, Corporation, Partnership, etc.)

Business Partners

Operating Agreement Location

DEBTS (other than mortgage & cars) & OBLIGATIONS

Note: See Real Estate section above for mortgage details

Type	Lender	Account Number	Balance	Contact Phone
Personal Loan				
Student Loan				
Credit Card 1				
Credit Card 2				
Credit Card 3				
Other				

DIGITAL ASSETS & ACCOUNTS

Email Accounts

Type	Provider	Email Address	Password Location
Primary			
Secondary			

Social Media Accounts

Platform	Username	Password Location

Online Storage & Other Digital Assets

Type	Provider/Platform	Account Info	Login/Password Location
Cloud Storage (Dropbox, Google Drive, iCloud)			
Cryptocurrency			
Password Manager			
Other			

PERSONAL SAFE

Location in Home

Combination

Contents

SAFETY DEPOSIT BOX

Bank Name

Branch Location

Box Number

Key Location

Contents

FINAL WISHES

Funeral/Memorial Preferences

Burial or Cremation

Preferred Funeral Home

Pre-paid Arrangements

Yes No

Location (if pre-paid)

Special Instructions

Additional Wishes

Organ Donation

Yes No

Charitable Donations in Lieu of Flowers (Organization)

Military Service

Military Service Records (DD-214) Location

Other Wishes

ADDITIONAL NOTES

Use this space for any other important information your family should know

IMPORTANT REMINDERS

- Update this document regularly or after major life events
- Store this in a secure but accessible location
- Tell your executor/trustee where to find this document
- Keep copies of important documents with this organizer
- Review beneficiary designations on all accounts regularly

DOCUMENT LOCATION SHARED WITH

Name

Date

Name

Date