

Name: _____

Date: _____

ESTATE ORGANIZER

Location A. Documents in my home: _____

Location B. Documents in my office: _____

Location C. Safe deposit box: _____

Location D. Other: _____

Location E. Other: _____

Location F. Other: _____

ITEM

LOCATION

	A	B	C	D	E	F
My Will.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse/Partner's Will.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funeral arrangement documents.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safe combination, business.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safe combination, home.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listing of Personal Information Numbers and Passwords.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key to Safe Deposit Box.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life insurance policies.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health insurance policy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Homeowners insurance policy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto insurance policy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business agreements.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of credit cards.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements, cancelled checks.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment certificates/stocks/bonds.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokerage accounts records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate retirement plan./Profit sharing plan.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keogh or IRA plan.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annuity contracts.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock-option plan/Stock-purchase plan.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income and gift tax returns.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Titles and deeds to real estate and land.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Title insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental property records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes and other loan agreements, including mortgages.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of stored and loaned valuable possessions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto ownership records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boat ownership records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Birth certificate.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marriage certificate.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Divorce/separation records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Names and addresses of relatives/friends.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listings of professional/fraternal organization membership.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

KEY PEOPLE TO NOTIFY

In case of emergency or death, the principal contacts are:

KEY PERSONAL CONTACT

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

KEY PERSONAL CONTACT

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

SPIRITUAL ADVISOR

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

EXECUTOR

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

CHILDREN'S GUARDIAN

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

PHYSICIAN

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

ADVISORS TO NOTIFY

KEY LEGAL ADVISOR

<i>Name & Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

KEY FINANCIAL OR INVESTMENT ADVISOR

<i>Name & Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

LIFE INSURANCE PROFESSIONAL

<i>Name & Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

HOME AND AUTO INSURANCE AGENT

<i>Name & Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

ACCOUNTING/TAX ADVISOR

<i>Name & Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

BANK MANAGER

<i>Name & Bank</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

FINANCIAL INFORMATION

BANK, FINANCIAL INSTITUTION, BROKERAGE ACCOUNTS

1.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
2.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
3.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
4.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
5.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
6.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>

PENSION/IRA/RETIREMENT ACCOUNTS

1.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
2.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
3.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
4.	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>

REAL ESTATE

1.	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
2.	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
3.	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
4.	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
5.	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>

LIFE INSURANCE POLICIES

1.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>
2.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>

3. _____ <i>Company</i>	_____ <i>Insured Name</i>	_____ <i>Death Benefit/Cash Value</i>
_____ <i>Beneficiary(ies)</i>		_____ <i>Policy Number</i>
4. _____ <i>Company</i>	_____ <i>Insured Name</i>	_____ <i>Death Benefit/Cash Value</i>
_____ <i>Beneficiary(ies)</i>		_____ <i>Policy Number</i>

BUSINESSES OWNED

1. _____ <i>Name of Entity</i>	_____ <i>Type of Entity</i>	_____ <i>Approximate Value</i>
_____ <i>Owner(s)</i>	_____ <i>Percentage Owned</i>	
2. _____ <i>Name of Entity</i>	_____ <i>Type of Entity</i>	_____ <i>Approximate Value</i>
_____ <i>Owner(s)</i>	_____ <i>Percentage Owned</i>	
3. _____ <i>Name of Entity</i>	_____ <i>Type of Entity</i>	_____ <i>Approximate Value</i>
_____ <i>Owner(s)</i>	_____ <i>Percentage Owned</i>	
4. _____ <i>Name of Entity</i>	_____ <i>Type of Entity</i>	_____ <i>Approximate Value</i>
_____ <i>Owner(s)</i>	_____ <i>Percentage Owned</i>	

OTHER ASSETS (CONTINUE ON BACK IF NECESSARY)

1. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
2. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
3. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
4. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
5. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
6. _____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>

SAFE DEPOSIT BOX

_____ <i>Name/Kind</i>	_____ <i>Owner(s)</i>	_____ <i>Approximate Value</i>
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Contents

HOW TO ACCESS DIGITAL ASSETS, ACCOUNTS, AND PASSWORDS

GENERAL COMMENTS AND THOUGHTS

MICHAEL A. KOENECKE
ATTORNEY AND COUNSELOR