



Later is Now

It's human nature to push off what isn't urgent. But now is the time to do the tedious work of inventorying your assets so that when you pass away, your loved ones won't be scrambling. This checklist is designed to help you gather these details together in one place. Store this confidential information in a secure and locked location to prevent fraud.

COMPLETED AS OF _____

IMPORTANT CONTACTS

	Name	Phone	Email
Financial Advisor			
Power of Attorney - Healthcare			
Power of Attorney - Property			
Executor			
Successor Trustee			
Attorney			
Accountant			

SAFE DEPOSIT BOX KEY AND LOCATION

Facility Name	Address	Box Number	Notes (key location, etc)

IMPORTANT DOCUMENTS

- | | |
|---|--|
| <input type="checkbox"/> Last Will and Testament | <input type="checkbox"/> Healthcare Power of Attorney (including Living Will and/or DNR documentation) |
| <input type="checkbox"/> Revocable Trust | <input type="checkbox"/> Irrevocable Trust |
| <input type="checkbox"/> Power of Attorney for Property | |

LOCATION OF DOCUMENTS

INSURANCE POLICIES

Company / Contact	Policy Type	Insured	Policy Number	Amount

REAL ESTATE/PROPERTY HOLDINGS

Copies of pertinent documents for each property:

- Deeds
- Purchase Agreements
- Notes
- Original Mortgage
- Rental and/or Lease Agreements
- Uniform Residential and/or Commercial Appraisal Reports
- Insurance
- Property Tax

Address	Ownership Title	Property Index Number (PIN)	Estimated Value

