ESTATE PLANNING ORGANIZER

Information and Resources for Organizing Your Estate Planning Information for You and Your Loved Ones.



INTRODUCTION

9,	, in order to simplify r	my affairs and estate plan
for my family and loved ones, have c	reated this Estate Plannin	g Organizer. My intent in
creating this organizer is to consolida	te information about my a	ussets, liabilities, and other
financial affairs, as well as my estate	plan for the convenience of	f those who are
administration of my estate.	'	
9 do not intend this document, or an	y information contained he	erein to replace my trust,
will, or any other estate planning doc	cument currently in effect.	, ,
9 have signed this document this	day of	, 20
Signature		
Printed Name		
Copies of this document were given to	the following individuals:	



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Advisors and Persons to Contact

Attorney:	Accountant:
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
Financial Advisor:	Insurance Advisor:
Name:	Name:
	Address:
Phone:	Phone:
Email:	Email:
Money Manager:	Employer:
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:



Other:	Other:
Name:	Name:
Address:	Address:
Phone:	
Email:	Email:
Other:	Other:
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
Other:	Other:
Name:	Name:
	Address:
Phone:	Phone:
Email:	
Other:	Other:
Name:	Name:
Address:	
Phone:	Phone:
Emacile	Ena illa



SCHEDULE OF ASSETS

Bank Accounts (Checking, Savings, Money Market, and CDs)

Type of Account:	Financial Institution:	
	Approximate Balance:	
Contact:	Location of any Documents:	
	•	
Type of Account:	Financial Institution:	
Account Number:	Approximate Balance:	
Contact:	Location of any Documents:	
Notes:		
Type of Account:	Financial Institution:	
Account Number:	Approximate Balance:	
Contact:	Location of any Documents:	
Notes:		
Type of Account:	Financial Institution:	
	Approximate Balance:	
	Location of any Documents:	
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Type of Account:	Financial Institution:	
	Approximate Balance:	
	Location of any Documents:	
Notes:		
Type of Account:	Financial Institution:	
Account Number:	Approximate Balance:	
	Location of any Documents:	
Notes:		
Type of Account:	Financial Institution:	
	Approximate Balance:	
	Location of any Documents:	
Notes:		
Type of Account:	Financial Institution:	
Account Number:		
	Location of any Documents:	
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After Tax Brokerage Accounts

Type of Account:	Financial Institution:
Account Number:	Approximate Balance:
Contact:	Location of any Documents:
Notes:	
Type of Account:	Financial Institution:
	Approximate Balance:
	Location of any Documents:
Notes:	
Type of Account:	Financial Institution:
	Approximate Balance:
	Location of any Documents:
Notes:	
Type of Account:	Financial Institution:
	Approximate Balance:
^	Location of any Documentor
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Tax Retirement Ac Type of Account: Account Number: Type of Account: Account Number: Contact: Notes: Type of Account: Account Number: Contact: Notes: Type of Account: Account Number: Contact: Notes: Type of Account: Account Number:	Financial Institution:



Cash Value Life Insurance Policies

*** Include life insurance policies with cash, accumulation, or surrender values in the "Life Insurance Policies" section.

Annuities

Financial Institution:	Contract Number:
	Approximate Value:
Contact:	Location of any Documents:
Notes:	
Financial Institution:	Contract Number:
Annuity Type:	Approximate Value:
Contact:	Location of any Documents:
Notes:	
Financial Institution:	Contract Number:
Annuity Type:	Approximate Value:
Contact:	Location of any Documents:
Notes:	
	Investment Partnerships vned by entities wholly owned by you.)
s not include real estate ow	vned by entities wholly owned by you.)
s not include real estate on Entity / Investment Name:	vned by entities wholly owned by you.) Entity Type:
Entity / Investment Name: Shares or Units of Ownersh	wned by entities wholly owned by you.) Entity Type: Approximate Value:
Entity / Investment Name: Shares or Units of Ownersh Contact:	vned by entities wholly owned by you.) Entity Type:
Entity / Investment Name: Shares or Units of Ownersh Contact: Notes: Entity / Investment Name:	Entity Type: Entity Type: Approximate Value: Location of any Documents: Entity Type:
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Real Estate

(Include real estate owned by entities wholly owned by you.)

		Approximate Value:
		ny Documents:
Property Address:		
Form of Ownership:		Approximate Value:
Contact:	Location of a	ny Documents:
Notes (Cost Basis [if	known]:	
Property Address:		
		Approximate Value:
		ny Documents:
[
or Accete (Dare	anal Branarty Cry	otoourronov Notos Bossivahl
er Assets (Perst	onal Property, Gry	otocurrency, Notes Receivabl
		Approximate Value:
Location:	Notes:	
Asset:		Approximate Value:
Location:	Notes:	
Asset:		Approximate Value:
Location:	Notes:	
Asset:		Approximate Value:
Location:	Notes:	
Asset:		Approximate Value:
Asset:		
Lagadiana		Approximate Value:
Location:		Approximate Value:
Asset:Location:	Notes:	Approximate Value:
Asset:	Notes: Notes:	Approximate Value:



SCHEDULE OF LIABILITIES

Credit Cards

Credit Card Name:	Account Number:	
	Approximate Balance:	
Contact:	Location of any Documents:	
Notes:	·	
Credit Card Name:	Account Number:	
Financial Institution:	Approximate Balance:	
Contact:	Location of any Documents:	
Notes:		
Credit Card Name:	Account Number:	
Financial Institution:	Approximate Balance:	
	Location of any Documents:	
Notes:		
Mortgages		
Financial Institution:	Account Number:	
Associated Property:	Approximate Balance:	
	Location of any Documents:	
Notes (Terms of Mortgage): _		
	Account Number:	
Associated Property:	Approximate Balance:	
	Location of any Documents:	
Notes (Terms of Mortgage): _		
Other Liabilities		
Liabilitv:	Account Number:	
	Approximate Balance:	
Notes:		
Liability:	Account Number:	
	Approximate Balance:	
Notes:		



LIFE INSURANCE POLICIES

Term Life Insurance Policies

	Policy Number:	
Death Benefit:	Beneficiaries:	
Contact:	Location of any Docur	nents:
Notes:		
lssuer:	Policy Number:	Term:
	Beneficiaries:	
	Location of any Docur	
Issuer:	Policy Number:	Term: _
	Beneficiaries:	
	Location of any Docur	
lssuer:	Policy Number:	Death Benefit:
	Policy Number:	Death Benefit:
Beneficiaries:		
Beneficiaries: Type:	Cash Value:	Loans on Policy:
Beneficiaries: Type: Contact:		Loans on Policy:
Beneficiaries: Type: Contact: Notes:	Cash Value: Location of any Docur	Loans on Policy: nents:
Beneficiaries: Type: Contact: Notes: Issuer:	Cash Value: Location of any Docur	Loans on Policy: nents:
Beneficiaries: Type: Contact: Notes: Issuer: Beneficiaries:	Cash Value: Location of any Docur	Loans on Policy: nents: Death Benefit:
Beneficiaries: Type: Contact: Notes: Issuer: Beneficiaries: Type:	Cash Value: Location of any Docur	Loans on Policy: nents: Death Benefit: Loans on Policy:
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Beneficiaries: Type: Contact: Notes: Issuer: Beneficiaries: Type: Contact: Notes:	Cash Value: Location of any Docur Policy Number: Cash Value: Location of any Docur	Loans on Policy: nents: Death Benefit: Loans on Policy: nents:
Beneficiaries: Type: Contact: Notes: Issuer: Beneficiaries: Contact: Notes: Issuer: Beneficiaries:	Cash Value: Location of any Docur Policy Number: Cash Value: Location of any Docur Policy Number:	Loans on Policy: nents: Death Benefit: Loans on Policy: nents: Death Benefit:
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Beneficiaries: Type: Contact: Notes: Issuer: Beneficiaries: Contact: Notes: Issuer: Beneficiaries: Type:	Cash Value: Location of any Docur Policy Number: Cash Value: Location of any Docur Policy Number:	Loans on Policy: nents: Death Benefit: Loans on Policy: nents: Death Benefit: Loans on Policy:



Pensions and Deferred Compensation

Pensions

Employer:	Pension / Account Number:	
Plan Administrator:	Contact:	
	Cash Value:	
Contact:	Location of any Documents:	
Employer:	Pension / Account Number:	
	Contact:	
	Cash Value:	
Contact:	Location of any Documents:	
erred Compensatio		
Employer:	Account Number:	
Plan Administrator:	Contact:	
Terms After Death:	Cash Value:	
Contact:	Location of any Documents:	
Notes:		
Employer:	Account Number:	
	Contact:	
	Cash Value:	
Contact:	Location of any Documents:	
Employer:	Account Number:	
	Contact:	
Terms After Death:	Cash Value:	
	Location of any Documents:	
Notes:		



ESTATE PLANNING DOCUMENTS

Revocable Living Trusts

Name of Trust:	Date.
Settlor(s) / Trustor(s):	
Initial Trustee(s):	
Successor Trustee(s):	
Distribution Notes:	
Location of Document:	
Notes:	
	D.1.
Name of Trust:	
Settlor(s) / Trustor(s):	
Successor Trustee(s):	
Distribution Notes:	
Location of Document:	
Notes:	
LIAGUA and Tastamant / Dayway	\A(!!!/a)
t Will(s) and Testament / Pourove	er will(s)
Creator	
	Dato:
Evecutor(s):	
	Date:
Guardians of Minor Children (if Any):	
Guardians of Minor Children (if Any): Location of Document:	
Guardians of Minor Children (if Any): Location of Document: Distribution Notes:	
Guardians of Minor Children (if Any): Location of Document: Distribution Notes:	
Executor(s):	
Guardians of Minor Children (if Any): Location of Document: Distribution Notes: Notes: Principal: Agent(s):	Date:
Guardians of Minor Children (if Any): Location of Document: Distribution Notes: Notes: Principal: Agent(s): Guardians of Minor Children (if Any):	Date:
Guardians of Minor Children (if Any): Location of Document: Distribution Notes: Notes: Principal: Agent(s): Guardians of Minor Children (if Any): Location of Document:	Date:
Guardians of Minor Children (if Any): Location of Document: Distribution Notes: Notes: Principal: Agent(s):	Date:



ower(s) of Attorney	
Principal:	Date:
Agent(s):	
<u> </u>	
Notes:	
Principal:	Date:
Agent(s):	
Location of Document:	
Notes:	
dvance Health Care Directive(s)	
Principal:	Date:
Agent(s):	
End-of-Life Decision:	
Location of Document:	
Notes:	
Principal:	Date:
Agent(s):	
End-of-Life Decision:	
Location of Document:	
Notes:	
Certification of Trust Present? Location of Document / Notes:	
Declaration of Trust Present?	If so, What is the Date?
Location of Document / Notes:	
Personal Property Distributions Present? _ Location of Document / Notes:	
Marital Property Agreement Present? Location of Document / Notes:	
Assignment of Personal Property Present? Location of Document / Notes:	



OTHER LEGAL DOCUMENTS

Other Legal Documents

Type of Document:	Date:
Location of Document:	
Notes:	
	_
Type of Document:	Date:
Parties to Document:	
Location of Document:	
Notes:	
Type of Document:	Date:
Parties to Document:	
Location of Document:	
Notes:	
	_
Type of Document:	Date:
Parties to Document:	
Location of Document:	
Notes:	
Type of Document:	Date:
Parties to Document:	
Location of Document:	
Notes:	
	Date:
Parties to Document:	
Location of Document:	
Notes:	



Passwords and Digital Assets

(***Due to the sensitivity of passwords and digital asset information, use caution recording and maintaining this.)

Social Media

Website / App:	Username:
Password:	Username:Password Hint: Associated Phone:
Associated Email:	Associated Phone:
Instructions for Account (Me	emorialize / Delete / Announcements / Ongoing Usage, Etc.):
Notes:	
Website / App:	Username:Password Hint:
Password:	Password Hint:
Associated Email:	Associated Phone:
Instructions for Account (Me	emorialize / Delete / Announcements / Ongoing Usage, Etc.):
Notes:	
Website / App:	Username: Password Hint:
Password:	Password Hint:
Associated Email:	Associated Phone:
Instructions for Account (Me	emorialize / Delete / Announcements / Ongoing Usage, Etc.):
Website / App:	Username:Password Hint:
Password:	Password Hint:
Associated Email:	Associated Phone:
Instructions for Account (Me	emorialize / Delete / Announcements / Ongoing Usage, Etc.):
Notes:	



Other Website Login Credentials

Website / App:	Username:
	Password Hint:
	Associated Phone:
Notes:	
Paccword:	Username:
	Password Hint:
	Associated Phone:
Website / App:	Username:
Password:	Password Hint:
Associated Email:	Associated Phone:
Notes:	
Website / App:	Username:
Password:	Password Hint:
	Associated Phone:
Website / App:	Username:
Password:	Password Hint:
	Associated Phone:
Wahaita / Ann	Username:
	Password Hint:
Notes:	A3300lated I Holle.
otocurrency	
Notes:	



OTHER IMPORTANT INFORMATION

Other Important Information

Title:	 	 	
Notes:			
Title:			
Notes:			
Title:			
Notes:			
Title:			
Notes:			
110100.			
Title:			
Notes:			
Title:			
Notes:			
Title:			
Notes:			



FINAL WISHES

Pre-Made Funeral Arrangements (If Any)

	Account information:
Location of Documents:	
norial Instructions	
nonai mstructions	
Name:	
Method of Disposition (Buried	/ Cremated / Interred):
Preferred Cemetery:	
Special Instructions / Notes:	
Name:	
	/ Cremated / Interred):
Preferred Mortuary:	
Preferred Cemetery:	
Special Instructions / Notes: _	
ed Burial Plots	
ied Buriai Flots	
Location	Diat Identification Information
Address and Contact:	Plot Identification Information:
Location of Documents:	
110163	
Location:	Plot Identification Information:
LUCATION.	
Address and Contact:	
Address and Contact:	



FAMILY HISTORY

My Immediate Family

My Full Name:	Birthdate:
Other Important Dates:	
Notes:	
Spouse Full Name:	Birthdate:
Place of Birth:	
Notes:	
Child Full Name:	Birthdate:
Notes:	
Child Full Name:	Birthdate:
Notes:	
Child Full Name:	Birthdate:
Other Important Dates:	
Child Full Name:	Birthdate:
Notes:	
Child Full Name:	Birthdate:
Other Important Dates:	
Notes:	



My Extended Family

My Father's Full Name:	Birthdate:	
Notes:		
	Birthdate:	
Place of Birth:		
notes:		
Family Member's Full Name	Birthdate:	
Notes:		_
Family Member's Full Name:	Birthdate:	
Location in Family Tree:		
Notes:		
	Birthdate:	
		_
Notes:		
Family Member's Full Name	Birthdate:	
	Similares.	
Notes:		_
Family Member's Full Name:	Birthdate:	
Location in Family Tree:		
Notes:		
	5	
	Birthdate:	
Location in Family Tree:		—
Notes:		
Family Member's Full Name:	Birthdate:	
	birtildate.	
Notes:		_
Notes:		
Family Member's Full Name:	Birthdate:	
Location in Family Tree:		
Notes:		_



COMMENTS FOR LOVED ONES

