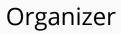




Document Locator
NAME DATE
Please indicate the location of the following items:
PERSONAL
Original Will (self)
Original Will (spouse)
Special Estate Instructions—Written
Special Estate Instructions—Video
Combination to Personal Safe
All Passwords
Bank Safe Deposit Box
Trust Documents
Power of Attorney
Health Care Power of Attorney
Living Will
Birth Certificate
Military Records
Marriage Certificate
Divorce Papers
BUSINESS PROFESSIONAL
Partnership/LLC Documents
Corporate Documents
Inventory of Business Assets
Buy-Sell Documents
Pension Plans
Other Employee Retirement Benefits





TAX RETURNS & RECORDS
Income Tax Returns
Records for Tax Bases of Property
Gift Tax Returns
INSURANCE POLICIES
Life Insurance—Group
Life Insurance—Individual(s)
Property/Casualty
Umbrella Liability
Disability
Income Annuities
FINANCIAL ASSETS
Checking Accounts
Money Market Accounts
Savings Account
Certificates of Deposit
Credit Union Accounts
Securities Accounts
Mutual Fund Accounts
OTHER INSTRUMENTS/PAPER
Original Deeds to Real Property
Mortgages or Leases
Affidavits Re: Domicile
Affidavits Re: Community Property
Affidavits Re: Senarate Property