

Information for My Executor

Locations of documents/property:

- Will/Advance directives _____
- Pre-need funeral contract _____
- Cemetery deed _____
- Safe deposit box key _____
- Birth certificate/Marriage license _____
- Mortgages and notes _____
- Deeds and titles _____
- Insurance policies _____
- Income tax records _____
- Stocks and bonds _____
- Retirement/pension plan _____
- Social Security/Veterans papers _____
- Checkbooks and passbooks _____
- Other important papers/property _____
- _____

Names and phone numbers of professionals/companies:

- Physician _____
- Lawyer _____
- Accountant _____
- Brokers _____
- Insurance agents _____
- Banks _____
- Others _____

Credit cards and charge accounts to be canceled:

- _____
- _____
- _____
- _____
- _____

Signed _____ Date _____