



PLAN today... PRESERVE tomorrow...

Estate planning isn't just the preparation of legal documents. After your death, the failure to organize your affairs may cause your loved ones unnecessary court costs, legal fees, taxes and lost benefits (i.e, policy benefits and other assets may go unclaimed and be turned over to the State of Florida). To prevent a disorganized estate with potential time consuming and financial losses to your beneficiaries, have a well-planned and well-organized estate. By doing some organizational planning today, you will preserve your estate for loved ones tomorrow.

1. PERSONAL DATA (keep copies of the following)

- ✓ Driver's licenses
- ✓ Voters registration
- ✓ Lists of organizations/clubs and other memberships
- ✓ Social Security card
- ✓ Veteran's Administration/Military benefits

2. FAMILY MEMBERS/BENEFICIARIES

Name and Nicknames: _____

Address: _____

Telephone numbers (home, work and cell): _____

Email: _____ Social Security number: _____

Relationship: _____ Marital Status: _____ Date of Birth: _____

Name and Nicknames: _____

Address: _____

Telephone numbers (home, work and cell): _____

Email: _____ Social Security number: _____

Relationship: _____ Marital Status: _____ Date of Birth: _____

Name and Nicknames: _____

Address: _____

Telephone numbers (home, work and cell): _____

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Name and Nicknames: _____

Address: _____

Telephone numbers (home, work and cell): _____

Email: _____ Social Security number: _____

Relationship: _____ Marital Status: _____ Date of Birth: _____



3. LOCATION OF YOUR VALUABLE DOCUMENTS

Original estate planning documents: _____
Deeds to real estate: _____
Titles (cars, boats, planes, etc): _____
Birth and Marriage certificates: _____
Divorce Decrees and Pre/Post nuptial Agreements: _____
Citizenship documents: _____
Tax Returns (individual, gift tax returns, etc): _____
Business interests (organizational documents, Buy-Sell Agreements): _____

4. LIST OF YOUR PROFESSIONALS AND ADVISORS

ATTORNEY

Name: _____
Address: _____
Telephone: _____ E-mail: _____

CPA

Name: _____
Address: _____
Telephone: _____ E-mail: _____

FINANCIAL/STOCKBROKERS

Name: _____
Address: _____
Telephone: _____ E-mail: _____

INSURANCE REPRESENTATIVE

Name: _____
Address: _____
Telephone: _____ E-mail: _____

PHYSICIANS

Name: _____
Address: _____
Telephone: _____ E-mail: _____

Name: _____
Address: _____
Telephone: _____ E-mail: _____

MINISTER/ PRIEST/ RABBI

Name: _____
Address: _____
Telephone: _____ E-mail: _____



5. DIGITAL ASSETS

Passwords to your financial accounts, email accounts, e-commerce accounts, Facebook, Twitter, on-line subscriptions, alarms, cell phones (access code and password) and all other on-line accounts should be readily available. There are on-line services to keep your information secure such as: Securesafe.com, Legacylocker.com and Assetlock.com.

Account Name: _____

Account Number: _____

Password: _____

Account Name: _____

Account Number: _____

Password: _____

Account Name: _____

Account Number: _____

Password: _____

Account Name: _____

Account Number: _____

Password: _____

6. SAFE DEPOSIT BOX

Bank Location: _____

Box Number: _____ Key Location: _____

MAKE SURE someone else's name is on the box as a joint owner with you to prevent the necessity of probate.

7. PREPAID FUNERAL ARRANGEMENTS

Arrangements with: _____

MAKE SURE to communicate your wishes to your family members.

8. FINANCIAL ACCOUNTS

Name of Institution: _____

Address: _____

Telephone: _____ Account Number: _____

Name of Institution: _____

Address: _____

Telephone: _____ Account Number: _____

Name of Institution: _____

Address: _____

Telephone: _____ Account Number: _____



9. INSURANCE POLICIES (Life, Health, Disability, Homeowners, Long-term care, Automobile)

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

10. RETIREMENT BENEFITS

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

Name of Company: _____

Contact person: _____ Telephone: _____

Address: _____

Policy Number: _____ Beneficiary designations: _____

MAKE SURE to update your beneficiary designations in the event of a death or divorce!



11. BUSINESS INTERESTS

Name of Company: _____

Type of entity: _____ Contact person: _____

Address: _____

Telephone: _____ Email address: _____

Name of Company: _____

Type of entity: _____ Contact person: _____

Address: _____

Telephone: _____ Email address: _____

12. OTHER ASSETS (ie., Loans Receivable)

Description of asset: _____

Contact information: _____

13. DEBTS

Name of Lender: _____

Address: _____

Telephone: _____ Account Number: _____

Name of Lender: _____

Address: _____

Telephone: _____ Account Number: _____

Name of Lender: _____

Address: _____

Telephone: _____ Account Number: _____

List any debts that are paid-off in event of death: _____

14. INCOME INFORMATION (Including Military and VA Benefits)

Source of Income: _____ Account Number: _____

Contact person: _____ Telephone: _____

Address: _____

Source of Income: _____ Account Number: _____

Contact person: _____ Telephone: _____

Address: _____

15. PETS Arrangements for pets in event of sudden death (i.e, Provisions in Estate Planning Documents)

Veterinarian: _____

Address: _____

Telephone: _____ Pet Insurance: _____

