

Estate Information Organizer¹

for

I. Miscellaneous

Location of Safe Deposit Box:

Location of Safe Deposit Box Key(s):

Location of Tax Records:

Other:

II. Personal Information

Location of Wills, Trusts, Powers of Attorney and Medical Documents:

¹ This Estate Information Organizer was created by Atty. Patrick S. Sylvester of SYLVESTER LAW FIRM, PC. Pencil should be used in completing this Organizer so that changes can be easily made.

Location of Birth Certificates:

Location of Marriage License:

Location of Military Records:

Location of Social Security Cards:

Location of Court Judgments:

Location of Bank Records:

Location of Miscellaneous Personal Papers:

III. Advisors and Contacts

Name	Address	Telephone
<i>Personal Representative</i>		
<i>Trustee</i>		
<i>Attorney</i> Patrick S. Sylvester Sylvester Law Firm, PC	1000 Skokie Boulevard Suite 355 Wilmette, IL 60091	Toll free (866) 369-1200
<i>Doctor(s)</i>		
<i>Religious Advisor</i>		
<i>Funeral Home</i>		
<i>Accountant</i>		
<i>Insurance Agent</i>		
<i>Financial Advisor</i>		

IV. Wake, Funeral Service and Burial Directions

Wake and Funeral Service:

My body should be buried at:

My body should be cremated and the ashes:

My body should be donated to:

Specific Comments, Wishes and Thoughts Related to Wake, Funeral Service and Burial:

V. Checking, Savings and Certificate of Deposit Accounts

Name & Address of Bank	Type of Account	Account Number

VI. Brokerage Accounts (*non-tax deferred*)

Name & Address of Bank	Type of Account	Account Number

VII. IRA and 401k Accounts (tax deferred)

Name & Address of Bank	Type of Account	Account Number

VIII. Individual Stocks

Location of Stock Certificates and Brokerage Account Records:

Name of Corporation	Name & Address of Broker/Transfer Agent	Account Number or Certificate Number	Purchase Date & Purchase Price

IX. Individual Bonds

Location of Bond Certificates and Brokerage Account Records:

Type of Bond	Name & Address of Agent to Contact	Bond or Account Number	Purchase Date & Purchase Price

X. Real Estate

Location of Deeds:

Address	Type of Property	Name and Address of Co-Owner	Purchase Date & Purchase Price

XI. Life Insurance and Annuities

Location of Policies:

Company Name & Address	Person Insured	Beneficiary

XII. Accounts Receivable (money owed to me)

Location of Notes, Contracts, etc.:

Debtor Name & Address	Due Date of Payment	Security for Debt

XIII. Business Assets

Location of Contracts, Buy-Sell Agreements, Business Operating Agreements, etc.:

Description of Business Asset	Location of Business Asset	Account Number or ID Number

XIV. Cars, Trucks, Campers, Boats, Motorcycles, Etc.

Location of Titles:

Description	Location	Name & Address of Co-Owner	Purchase Date & Purchase Price

XV. Other Insurance

Location of Policies:

Type	Company	Benefits
<i>Disability</i>		
<i>Medical</i>		
<i>Long-term Care</i>		
<i>Business Liability</i>		
<i>Auto</i>		
<i>Home Owner's</i>		

