

ESTATE INFORMATION ORGANIZER

Name: _____

I. Miscellaneous

Location of Safe Deposit Box and Safe Deposit Box Keys:

Location of Last Three Years' State and Federal Tax Returns:

II. Personal Information

Location of Will, Trust, Powers of Attorney and Advance Directive:

Location of Birth Certificate:

Location of Marriage License:

Location of Military Records:

Location of Social Security Card:

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>		
Atty. Patrick S. Sylvester	Sylvester Law Firm, PC 1000 Skokie Boulevard Suite 420 Wilmette, IL 60091	(847) 251 – 2999

<i>Doctor</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:

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 Individual Stock Certificates:

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

IX. Individual Bonds

Location of Individual Bond Certificates:

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 of Insurance	Company	Benefits
<i>Disability</i>		
<i>Medical</i>		
<i>Long-Term Care</i>		
<i>Auto</i>		
<i>Homeowner's</i>		
<i>Umbrella</i>		
<i>Business Liability</i>		

