

SUMMARY OF INFORMATION

1. **Important Individuals** (doctor/attorney/accountant - names/addresses)
2. **Living Will** (is there one, if yes, where is the original)
3. **General Durable Power of Attorney - financial** (is there one, if yes, where is the original)
4. **General Durable Power of Attorney - health care** (is there one, if yes, where is the original)
5. **Trust** (is there one)
6. **Last Will and Testament** (is there one, if yes, where is the original)
7. **Safe Deposit Box** (is there one, if yes, where located at and where is the key)
8. **Bank Accounts** (savings/checking/CD's - what and where located at)
9. **Mutual Funds** (what and who with)
10. **Bonds** (what and where located at)
11. **Retirement** (what and through who)
12. **Stock** (what and where)
13. **Insurance** (life/property/casualty/accident/health - what type and who it's with)
14. **Real Estate** (legal descriptions, abstracts - where located at)
15. **Loans - you as borrower** (for what do you owe, and with who)
16. **Loans - you as lender** (who owes you, and for what)
17. **Motor Vehicles** (what, and where are the titles located at)
18. **Machinery** (what and where located at)
19. **Tax Returns** (who prepares them, and where are past year copies kept)
20. **Special Requests** (if so, what)