

Where My Assets Are

One big problem for survivors, when death has occurred, is simply finding all the property and valuable papers of the deceased. You can do your heirs and executor a real favor by filling out this form and giving copies to your spouse, other relatives who might help in settling your estate, any outside executor and your lawyer. Update the information periodically.

Name _____

Retirement System Registration No. _____ Social Security No. _____

My valuable papers and assets are stored in these locations (address plus where to look):

A. Residence _____

B. Safe-deposit Box _____

C. Other _____

ITEM	LOCATION			ITEM	LOCATION		
	A	B	C		A	B	C
My will (original)	_____	_____	_____	Retirement plans	_____	_____	_____
Powers of Attorney	_____	_____	_____	Deferred Compensation; IRA ...	_____	_____	_____
Spouse's will (original)	_____	_____	_____	Titles and deeds	_____	_____	_____
Safe Combination	_____	_____	_____	Notes, (mortgages)	_____	_____	_____
Trust agreements	_____	_____	_____	List of stored & loaned items ...	_____	_____	_____
Life Insurance	_____	_____	_____	Auto ownership records	_____	_____	_____
Health insurance policy	_____	_____	_____	Birth Certificate	_____	_____	_____
Homeowners policy	_____	_____	_____	Military discharge papers	_____	_____	_____
Car insurance policy	_____	_____	_____	Marriage certificate	_____	_____	_____
Employment contracts	_____	_____	_____	Children's birth certificates	_____	_____	_____
Partnership agreements	_____	_____	_____	Divorce/separation records	_____	_____	_____
List of checking, savings acc'ts .	_____	_____	_____	Other:	_____	_____	_____
List of credit cards	_____	_____	_____	_____	_____	_____	_____
Brokerage account records	_____	_____	_____	_____	_____	_____	_____

IMPORTANT NAMES, ADDRESSES AND PHONE NUMBERS

Attorney _____

Accountant _____

Insurance Agent _____

Date prepared _____

Copies given to _____

NOTE: Please be sure to tell your beneficiary or beneficiaries to contact the Retirement System upon your death to determine what benefits may be due.