

Instructions: Record personal information for anyone that is part of the estate you manage.

	Person 1	Person 2	
Full Name (Maiden)			
Social Security Number			
Birth Date			
Death Date			
Phone Number(s)			
Phone Type			
Home Address			
Primary Email			
Secondary Email			
Military Status			
Burial or Cemetery Details			
Will Location			
Executor			
Will Attorney			
Will Attorney Contact Information			
Trust Location			
Trustee and Relation			
Medical Power of Attorney			
Password Manager			
Phone Pin			
Computer/Laptop Password			
Notes			



Instructions: Record information for any real estate properties owned.

	Property 1	Property 2	
<b>Address</b>			
<b>Type</b>			
<b>Value</b>			
<b>Mortgage Holder</b>			
<b>Mortgage Account Number</b>			
<b>Amount Owed as of MM/YY</b>			
<b>Insurance Company</b>			
<b>Notes</b>			

Instructions: Record information for any vehicles, such as cars, boats, RVs, etc.

	<b>Vehicle 1</b>	<b>Vehicle 2</b>		
<b>Type</b>				
<b>Make/Model</b>				
<b>Year</b>				
<b>Value</b>				
<b>Location</b>				
<b>Loan Holder</b>				
<b>Loan Account Number</b>				
<b>Amount Owed</b>				
<b>Title Location</b>				
<b>Insurance Company</b>				
<b>Notes</b>				



Instructions: List all companies in which you pay recurring bills and subscriptions.

	Type	Vendor	Auto-draft Account	Frequency	Owner	Notes
Bill 1						
Bill 2						
Bill 3						
Bill 4						
Bill 5						
Bill 6						
Bill 7						
Bill 8						
Bill 9						
Bill 10						

Instructions: List all sources of recurring income, such as social security, pensions, or rental property.

	<b>Income 1</b>	<b>Income 2</b>					
<b>Source</b>							
<b>Deposit Account</b>							
<b>Amount</b>							
<b>Frequency</b>							
<b>Owner</b>							
<b>Notes</b>							

Instructions: Record names and contact information for any professional consultants or advisors.

	Type	Name	Contact Info	Notes			
<b>Professional 1</b>	<i>Attorney</i>						
<b>Professional 2</b>	<i>Accountant</i>						
<b>Professional 3</b>	<i>Broker</i>						
<b>Professional 4</b>	<i>Financial Advisor</i>						
<b>Professional 5</b>	<i>Clergy</i>						
<b>Professional 6</b>	<i>Business Partner</i>						
<b>Professional 7</b>							
<b>Professional 8</b>							
<b>Professional 9</b>							
<b>Professional 10</b>							