

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### ESTATE ORGANIZER

**1. WHERE TO FIND THINGS:**

**Location A.** Documents in my home: \_\_\_\_\_

**Location B.** Documents in my office: \_\_\_\_\_

**Location C.** Safe deposit box: \_\_\_\_\_

**Location D.** Other: \_\_\_\_\_

**Location E.** Other: \_\_\_\_\_

**Location F.** Other: \_\_\_\_\_

*Item*

*Location*

	A	B	C	D	E	F
My Will .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse/Partner's Will .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funeral arrangement documents.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safe combination, business.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safe combination, home.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listing of Personal Information Numbers and Passwords .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key to Safe Deposit Box.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life insurance policies .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health insurance policy .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Homeowners insurance policy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto insurance policy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business agreements .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of credit cards .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements, cancelled checks .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment certificates/stocks/bonds .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokerage accounts records .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate retirement plan./Profit sharing plan.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keogh or IRA plan .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annuity contracts .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock-option plan/Stock-purchase plan .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income and gift tax returns .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Titles and deeds to real estate and land .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Title insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental property records .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes and other loan agreements, including mortgages .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of stored and loaned valuable possessions .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto ownership records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boat ownership records.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Birth certificate .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marriage certificate .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Divorce/separation records .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Names and addresses of relatives/friends .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listings of professional/fraternal organization membership ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MICHAEL A. KOENECKE  
ATTORNEY AND COUNSELOR

**2. KEY PEOPLE TO NOTIFY:**

**KEY PERSONAL CONTACT**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**KEY PERSONAL CONTACT**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**SPIRITUAL ADVISOR**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**EXECUTOR**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**CHILDREN'S GUARDIAN**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**PHYSICIAN**

<i>Name</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**3. ADVISORS TO NOTIFY:**

**KEY LEGAL ADVISOR**

<i>Name &amp; Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**KEY FINANCIAL OR INVESTMENT ADVISOR**

<i>Name &amp; Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**LIFE INSURANCE PROFESSIONAL**

<i>Name &amp; Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**HOME AND AUTO INSURANCE AGENT**

<i>Name &amp; Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**ACCOUNTING/TAX ADVISOR**

<i>Name &amp; Firm</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**BANK MANAGER**

<i>Name &amp; Bank</i>	<i>Mobile Telephone</i>
<i>Address</i>	<i>Work Telephone</i>
<i>City, State, Zip</i>	<i>E-Mail Address</i>

**4. FINANCIAL INFORMATION:**

**BANK, FINANCIAL INSTITUTION, BROKERAGE ACCOUNTS**

1.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
2.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
3.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
4.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
5.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>
6.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Balance</i>

**PENSION/IRA/RETIREMENT ACCOUNTS**

1.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
2.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
3.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>
4.	_____	_____	_____
	<i>Institution</i>	<i>Account Number(s)</i>	<i>Approx. Value</i>

**REAL ESTATE**

1.	_____	_____	_____
	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
2.	_____	_____	_____
	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
3.	_____	_____	_____
	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
4.	_____	_____	_____
	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
5.	_____	_____	_____
	<i>Location</i>	<i>Owner(s)</i>	<i>Approx. Value</i>

**LIFE INSURANCE POLICIES**

1.	_____	_____	_____
	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	_____		_____
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>
2.	_____	_____	_____
	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	_____		_____
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>

3.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>
4.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit/Cash Value</i>
	<i>Beneficiary(ies)</i>		<i>Policy Number</i>

<b>BUSINESSES OWNED</b>
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1.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Approximate Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	
2.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Approximate Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	
3.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Approximate Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	
4.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Approximate Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	

<b>OTHER ASSETS (CONTINUE ON BACK IF NECESSARY)</b>
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1.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
2.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
3.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
4.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
5.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
6.	<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>

<b>SAFE DEPOSIT BOX</b>
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<i>Name/Kind</i>	<i>Owner(s)</i>	<i>Approximate Value</i>
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*Contents*

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**5. DIGITAL ASSETS AND ACCOUNTS:**

**HOW TO ACCESS DIGITAL ASSETS, ACCOUNTS, AND PASSWORDS GENERALLY**

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**SPECIFIC DIGITAL ASSETS AND ACCOUNTS**

- Apple: \_\_\_\_\_
- Bank Accounts: \_\_\_\_\_
- Credit Card: \_\_\_\_\_
- Credit Card: \_\_\_\_\_
- Email (other): \_\_\_\_\_
- Email (other): \_\_\_\_\_
- Facebook: \_\_\_\_\_
- Google: \_\_\_\_\_
- Instagram: \_\_\_\_\_
- ISP (Internet Service Provider): \_\_\_\_\_
- ISP (Internet Service Provider): \_\_\_\_\_
- Investment: \_\_\_\_\_
- Investment: \_\_\_\_\_
- Investment: \_\_\_\_\_
- LinkedIn: \_\_\_\_\_
- Microsoft: \_\_\_\_\_
- MySpace: \_\_\_\_\_
- Reddit: \_\_\_\_\_
- Tumblr: \_\_\_\_\_
- Twitter: \_\_\_\_\_
- YouTube: \_\_\_\_\_
- other*: \_\_\_\_\_
- other*: \_\_\_\_\_
- other*: \_\_\_\_\_
- other*: \_\_\_\_\_
- other*: \_\_\_\_\_

