

# Kick & Gilman, LLC

## Location of Important Papers and Valuable Property

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

My valuable property and important papers are in these locations (list address if needed)

Location A \_\_\_\_\_ Location B \_\_\_\_\_

\_\_\_\_\_

Location C \_\_\_\_\_ Location D \_\_\_\_\_

\_\_\_\_\_

List the letter for the corresponding location indicated above for each of your important documents.

### Location Wills & Estate Papers

### Location Retire. Plan Documents

### Location Insurance Policies

\_\_\_ My will (original)

\_\_\_ My will (copy)

\_\_\_ Spouse's will (original)

\_\_\_ Spouse's will (copy)

\_\_\_ Trust Agreements

\_\_\_ Power of Attorney

\_\_\_ Living Will/Medical Instr.

\_\_\_ Birth Certificate

\_\_\_ Marriage Certificate

\_\_\_ Divorce/Sep. Papers

\_\_\_ Military Papers

\_\_\_ Funeral/Burial Inst.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_ 403(b), IRA, Etc.

\_\_\_ Military, other public pensions

\_\_\_ Other private pensions

\_\_\_\_\_

### Financial & Legal Affairs

\_\_\_ Tax Files

\_\_\_ Titles (Car, Boat, Etc.)

\_\_\_ Mortgages, Notes

\_\_\_ List of Checking, Savings,

& other Accounts

\_\_\_ List of Stocks, Bonds, Mutual

Funds & other investments

\_\_\_ Employment/Business Agree.

\_\_\_\_\_

\_\_\_ Life

\_\_\_ Health

\_\_\_ Long-term Care

\_\_\_ Homeowner/Renter

\_\_\_ Car, Boat, Etc.

\_\_\_ Funeral Plan

\_\_\_\_\_

### Property & Other

\_\_\_ Keys to Home, Car,

Buildings, Locks, Etc.

\_\_\_ Safe Deposit Keys

\_\_\_ Safe & Combination

\_\_\_ List of Stored &

Loaned Properties

\_\_\_\_\_

Safe Deposit Box Location \_\_\_\_\_

Other Location Information \_\_\_\_\_

### Financial Accounts (Details)

Account Name

Account No.

Important Names, Addresses & Telephone Numbers

\_\_\_\_\_

\_\_\_\_\_

Attorney: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Insurance Agent: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Accountant: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Stock Broker: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_