**Planned Giving Location of Assets Form**

**Location of Important Papers:**

|  |  |  |
| --- | --- | --- |
| **TYPE OF DOCUMENTS** | **DOCUMENT** | **LOCATION** |
| **ESTATE PLANNING** | Will |   |
| **DOCUMENTS** | Living Trust |   |
|  | Power of Attorney |   |
|  | Health Care Directive (living will) |   |
|  | Anatomical Gift |   |
|  | Other |   |
| **TAX RECORDS**  | State and Federal Income Tax Returns |   |
|  | Other |   |
| **BANKING RECORDS** | Checkbooks |   |
|  | Passbooks |   |
|  | Certificates of Deposit |   |
|  | Bank Statements and Canceled Checks |   |
|  | Credit Card Records |   |
|  | Other |   |
| **REAL ESTATE** | Real Estate Deeds |   |
|  | Title Insurance Policies |   |
|  | Other |   |
| **INVESTMENT AND** | Stock and Bond Certificates |   |
| **RETIREMENT INCOME** | Brokerage Account Records |   |
|  | IRA AccountTax Deferred Annuity |   |
| **TITLE TO PERSONAL**  | Automobile Title |   |
| **PROPERTY** | Other Personal Property |   |
| **PERSONAL PAPERS** | Marriage Certificate |   |
|  | Birth Certificates |   |
|  | Military Records |   |
|  | Citizenship Papers |   |
|  | Divorce Judgments  |   |
|  | Other |   |
| **INSURANCE  PAPERS** | Life Insurance |   |
|  | Health Insurance |   |
|   | Other |   |

© 2008 The Moran Company

www.MoranCompany.com
*"We find great nonprofit executives"*

Page 1 of 2

**Key Advisors to Be Contacted:**

**Doctor**Phone # Hospital
Address

**Attorney** Phone # Firm
Address

**Accountant**

Phone # Firm

Address

**Clergyman/Rabbi**

Phone # Church/Synagogue

Address

**Relatives and Close Friends to Be Contacted:**

**Name**

Phone # Relationship

Address

**Name**

Phone # Relationship

Address

**Name**

Phone # Relationship

Address

**Name**

Phone # Relationship

Address

© 2008 The Moran Company

www.MoranCompany.com
*"We find great nonprofit executives"*

Page 2 of 2