

Planned Giving Location of Assets Form

Location of Important Papers:

TYPE OF DOCUMENTS	DOCUMENT	LOCATION
ESTATE PLANNING DOCUMENTS	Will	
	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 RETIREMENT INCOME	Stock and Bond Certificates	
	Brokerage Account Records	
	IRA Account Tax Deferred Annuity	
TITLE TO PERSONAL PROPERTY	Automobile Title	
	Other Personal Property	
PERSONAL PAPERS	Marriage Certificate	
	Birth Certificates	
	Military Records	
	Citizenship Papers	
	Divorce Judgments	
	Other	
INSURANCE PAPERS	Life Insurance	
	Health Insurance	
	Other	

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 _____