



Professional Advisors

Attorney

(Name)

(Phone)

(Address)

Accountant/Tax Preparer

(Name)

(Phone)

(Address)

Physician

(Name)

(Phone)

(Address)

Insurance Agent

(Name)

(Phone)

(Address)



Broker

(Name)

(Phone)

(Address)

Investment Advisor

(Name)

(Phone)

(Address)

Clergy

(Name)

(Phone)

(Address)

Banker

(Name)

(Phone)

(Address)



Location of Documents

A. Will

My original will is being held:

B. Life Insurance Policies

My life insurance policies are located:

My life insurance company is:

C. Health Insurance Policies

Information on my health insurance is located:

If you have any questions about what is covered you can call:

D. Automobile Insurance

Information on my automobile insurance is located.

If you have any questions about what is covered you can



E. Property Insurance

Information on my property insurance is located:

If you have any questions about what is covered you can call:

F. Power Of Attorney

A general power of attorney given by me to

is located:

G. Deeds To Property

Any deeds to property which I possess are located:

H. Instructions Concerning Last Rites And Burial Services

I have drafted some instructions concerning my last rites and burial. They are located:

I. Other Important Papers

Any other important papers which I have failed to list above are located:
