

PROPERTY & PERSONAL EFFECTS

Name of Deacon and/or Wife: _____

IMPORTANT DOCUMENTS

Primary Location of Important Documents

(Personal Residence/Bank or Financial Institution/Family/Friend) (Phone)

(Street Address) (City) (State) (Zip Code)

Safe Deposit Box, No. _____ Location of Key _____

Secondary Location

(Personal Residence/Bank or Financial Institution/Family/Friend) (Phone)

(Street Address) (City) (State) (Zip Code)

Checklist of Important Documents for Safekeeping

- | | | |
|---------------------------------|--|------------------------------|
| ____ Birth Certificates | ____ Military Discharge Papers (DD Form 214) | ____ Property Deeds |
| ____ Social Security Cards | ____ Income Tax Returns (last 3 yrs) * | ____ Cemetery Plot Deeds |
| ____ Passports | ____ Last Will & Testaments | ____ Car Titles/Bill of Sale |
| ____ Durable Power of Attorneys | ____ Pre-Arranged Funeral Plan Contracts | ____ Marriage License |
| ____ Medical Power of Attorneys | ____ Directive to Physicians | ____ Trusts |

Veteran's Records

(Branch of Service)

(Rank)

(Military Identification Number)

(Date Entered)

(Location of Discharge Papers)

(Date Discharged)

(VA Office to Notify)

(Phone)

PERSONAL PROPERTY

Please list those items which are your property. Be as specific as necessary so that your property and personal effects can be identified by those who would be responsible for your estate. It may be helpful to state the location of some items.

Bank Accounts (Checking, Savings, CDs, etc.)

- 1) Bank Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 2) Bank Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 3) Bank Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 4) Bank Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____

Brokerage Accounts (IRA, Annuity, Stocks, Bonds, Mutual Funds, etc.)

- 1) Bank/Institution Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 2) Bank/Institution Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 3) Bank/Institution Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____
- 4) Bank/Institution Name _____ Phone _____
Type of Account _____ Account Number _____
Pin Number _____ Beneficiary (POD) _____

Credit/Debit Cards (Bank, Retail, etc.)

- 1) Bank/Institution Name _____ Phone _____
Type of Card _____ Card Number _____
Pin Number _____
- 2) Bank/Institution Name _____ Phone _____
Type of Card _____ Card Number _____
Pin Number _____
- 3) Bank/Institution Name _____ Phone _____
Type of Card _____ Card Number _____
Pin Number _____
- 4) Bank/Institution Name _____ Phone _____
Type of Card _____ Card Number _____
Pin Number _____
- 5) Bank/Institution Name _____ Phone _____
Type of Card _____ Card Number _____
Pin Number _____

His & Her Insurance Policies (auto, life, health, property)

- 1) Name _____ Phone _____
Address _____
Policy Number _____ Value or Type of Policy _____
- 2) Name _____ Phone _____
Address _____
Policy Number _____ Value or Type of Policy _____
- 3) Name _____ Phone _____
Address _____
Policy Number _____ Value or Type of Policy _____
- 4) Name _____ Phone _____
Address _____
Policy Number _____ Value or Type of Policy _____

Insurance Policies continued... (auto, life, health, property)

5) Name _____ Phone _____

Address _____

Policy Number _____ Value or Type of Policy _____

6) Name _____ Phone _____

Address _____

Policy Number _____ Value or Type of Policy _____

Automobile(s)

Year	Make	Model	VIN#
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Year	Make	Model	VIN#
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Real Estate

1) _____
(Property Location and/or Description)

_____ (Phone)

_____ (Date Purchased) _____ (Date Sold) Paid for? ____ Yes ____ No

2) _____
(Property Location and/or Description)

_____ (Phone)

_____ (Date Purchased) _____ (Date Sold) Paid for? ____ Yes ____ No

Outstanding Loans and Debts

1) Name _____ Phone _____

Policy No. _____ Type of Loan/Debt _____ Amount _____

2) Name _____ Phone _____

Policy No. _____ Type of Loan/Debt _____ Amount _____

3) Name _____ Phone _____

Policy No. _____ Type of Loan/Debt _____ Amount _____

Vestments _____

Sacred Vessels _____

Books (include the location) _____

Furnishings _____

Art Work _____

Electronic Devices (stereo, television, computer, etc.) _____

Sporting/Athletic Equipment _____

Other Personal Items of Significance

1) _____

2) _____

3) _____

4) _____
