

PROPERTY & PERSONAL EFFECTS

Priest's Name: _____ Date: _____

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 (if any)

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

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

Important Documents for Safekeeping (check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Military Discharge Papers (DD Form 214) | <input type="checkbox"/> Property Deeds |
| <input type="checkbox"/> Social Security Card | <input type="checkbox"/> Income Tax Returns (last 3 yrs) | <input type="checkbox"/> Cemetery Plot Deed |
| <input type="checkbox"/> Passport | <input type="checkbox"/> Last Will & Testament | <input type="checkbox"/> Car Title or Bill of Sale |
| <input type="checkbox"/> Durable Power of Attorney | <input type="checkbox"/> Pre-Arranged Funeral Plan Contract | <input type="checkbox"/> Insurance Policies |
| <input type="checkbox"/> Medical Power of Attorney | <input type="checkbox"/> Directive to Physicians | |

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 _____

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#
_____	_____	_____	_____
Year	Make	Model	VIN#

Real Estate

1) _____
(Property Location and/or Description)

(Issuer of Loan) _____ (Phone)

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

2) _____
(Property Location and/or Description)

(Issuer of Loan) _____ (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/Priestly Papers (include the location) _____

Furnishings _____

Art Work _____

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

Sporting/Athletic Equipment _____

Other Personal Items of Significance

- 1) _____

- 2) _____

- 3) _____

- 4) _____
