



BOARDWALK

FINANCIAL STRATEGIES

Information for Our Executor

Personal Information

	1	2
Name (First, Middle, Last)		
Date of Birth		
Social Security Number		
Organ Donor? On Drivers Lic?		
Home Address		
Home Phone Number		
Password for Answering Machine		
Cell Phone Number		
Password to access?		
Home Fax Number		
Email Address		
Email Passwords		
Occupation		
Employer's Name		
Employer's Address		
Contact Person at Work		
Contact Phone Number		

Children:

	1	2
Name (First, Middle, Last)		
Date of Birth		
Social Security Number		
Home Address		
Home Phone Number		
Cell Phone Number		
Home Fax Number		
Email Address		

Children:

	3	4
Name (First, Middle, Last)		
Date of Birth		
Social Security Number		
Home Address		
Home Phone Number		
Cell Phone Number		
Home Fax Number		
Email Address		

Personal Information (continued)

Other Dependents:

	1	2
Name (First, Middle, Last)		
Relationship		
Date of Birth		
Social Security Number		
Home Address		
Home Phone Number		
Cell Phone Number		
Home Fax Number		
Email Address		

Other People to Contact:

Name	_____	_____
Phone	_____	_____
Relationship	_____	_____
Location of Address Book(s)	_____	

Advisors

	<u>Estate Attorney</u>	<u>Investment Advisor</u>
Name	_____	_____
Address	_____	_____
Phone	_____	_____
Fax	_____	_____
E-mail Address	_____	_____

	<u>Accountant</u>	<u>Other</u>
Name	_____	_____
Address	_____	_____
Phone	_____	_____
Fax	_____	_____
E-mail Address	_____	_____

Safe Deposit Box

Location	_____
Address	_____
Box Number	_____
Signors	_____
Location of Keys	_____

Access Information

Who has a key to the residence and any other property?

Their contact information

Where are the keys to vehicles located?

Is there an offsite mailbox? Where is it?

Where is the mailbox key? What number is the mailbox?

Log-in password to get into your computers, iPads, etc?

Is there a file of log-ins and passwords that will be needed?

How is it accessed?

Is there offsite storage? Where is the key/combination?

Where is the storage area?

Location of Personal Calendars

Burial Information and Final Wishes

	1 <u>Clergy</u>	2 <u>Clergy</u>
Name	_____	_____
Place of Worship	_____	_____
Address	_____	_____
	_____	_____
Clergy Phone	_____	_____
Fax	_____	_____
E-mail Address	_____	_____

	<u>Funeral Director</u>	<u>Funeral Director</u>
Name	_____	_____
Address	_____	_____
	_____	_____
Phone	_____	_____
Fax	_____	_____
E-mail Address	_____	_____

	<u>Cemetery Plot</u>	<u>Cemetery Plot</u>
Cemetery Name	_____	_____
Cemetery Location	_____	_____
	_____	_____
Plot Location	_____	_____
Location of Deed to Plot	_____	_____

Funeral Instructions:

Final Wishes:

Life Insurance

Policy Number
 Insured Person
 Policy Owner (if not insured)
 Beneficiaries
 Policy Type
 (whole life, term, employer, etc)
 Death Benefit
 Insurance Company
 Agent
 Phone Number
 Location of Policy
 Annual Premium
 Premium Due Date
 How is premium paid?
 Electronic payment information?

Policy Number
 Insured Person
 Policy Owner (if not insured)
 Beneficiaries
 Policy Type
 (whole life, term, employer, etc)
 Death Benefit
 Insurance Company
 Agent
 Phone Number
 Location of Policy
 Annual Premium
 Premium Due Date
 How is premium paid?
 Electronic payment information?

Insurance Policies Other than Life Insurance (continued)

Type of Insurance		
Insured Asset		
Policy Number		
Location of Policy		
Date Policy renews		
How is premium paid?		
Agent Name		
Agent Address		
Agent Phone		
Agent Fax		
Agent E-mail Address		
Website		
Log-in & Password		

Type of Insurance		
Insured Asset		
Policy Number		
Location of Policy		
Date Policy renews		
How is premium paid?		
Agent Name		
Agent Address		
Agent Phone		
Agent Fax		
Agent E-mail Address		
Website		
Log-in & Password		

Mortgages on Residence and Other Real Estate

 Property Mortgaged
 Bank/Mortgage Company
 Contact Information

 Monthly Payment
 Due Date
 How paid each month
 Electronic payment information

 Property Mortgaged
 Bank/Mortgage Company
 Contact Information

 Monthly Payment
 Due Date
 How paid each month
 Electronic payment information

Other Loans (Auto, Education, Home Equity, etc.)

 Type of Loan
 Bank/Mortgage Company
 Contact Information

 Monthly Payment
 Due Date
 How paid each month
 Electronic payment information

 Type of Loan
 Bank/Mortgage Company
 Contact Information

 Monthly Payment
 Due Date
 How paid each month
 Electronic payment information

Expenses

Do you pay your bills electronically or by check or both?

What bank account do you use for bill payment?

How do you keep track of when bills need to be paid?

Where do you keep your bills that are due to be paid?

Where do you keep your bills that have already been paid?

List your credit cards that are open and where to find statements and receipts

Do you use Quicken or another method to track income and expenses?

Where is it and how can it be accessed

Log-ins and Passwords needed

Where do you keep copies of your income tax returns?

Do you file any returns other than your personal return each year?
(Trust, Estate, Gift, etc)

Doctors

Specialty
 Office Name
 Doctor's Name
 Phone Number
 Who uses this doctor
 When did you start as a patient?
 Location of any records at home?
 Website
 Log-in and Password

Specialty
 Office Name
 Doctor's Name
 Phone Number
 Who uses this doctor
 When did you start as a patient?
 Location of any records at home?
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