



This booklet is a tool to help you organize information and record your possessions. Upon completion, it will provide a clear, precise record of your personal and financial information. It can be used to prepare an estate plan; it is also a convenient way of organizing information for your loved ones. You may wish to provide a copy to a family member and your executor as a safeguard against loss. This document should not be returned to the Presbyterian Foundation Group or its representatives.

Update your records annually. You should enter the date every time you look over the book even if you don't change any of the information. This will assure the reader of the current accuracy of the entries.

NAME _____

DATE REVISED _____

DATE REVIEWED _____

PERSONAL INFORMATION

Birth Certificate Yes No

Birth Certificate located _____

Citizenship: Date/place of naturalization if not U.S. citizen
by birth _____

Date of Birth _____

Social Security # _____

Religious Affiliation _____

Church _____

Address _____

Father's Full Name _____

Mother's Full Name _____

Current Marital Status:

Single Married Widowed Divorced Separated

Spouse's Name _____

Date & State married _____

Certificate located _____

Previous marriage(s)

Date _____ Name _____

Marriage ended by Death Divorce

Date & State _____

Children:

Name _____

Address _____

Name _____

Address _____

Name _____

Address _____

Military Service: Date(s) _____

Service Serial # _____

Discharge papers located at _____

LIVING WILL DIRECTIVE AND ORGAN DONATION

I have a living will directive stating my wishes for medical care and treatment if I am seriously ill. The document is dated _____ and is located _____

The names and addresses of individuals who have copies are:

Name _____ Phone _____

Address _____

Name _____ Phone _____

Address _____

I have agreed to donate organs to [organization] _____

The papers are located _____

I have given the following person durable power of attorney which will go into effect upon my inability to act for myself-

Name _____ Phone _____

Address _____

LAST WILL AND TESTAMENT

Will written _____ Located _____

Executor of Will

Address _____

Lawyer who prepared my will is _____

Firm _____

Location _____

In my will, I have left the following charitable bequest(s):

Charity _____

Bequest Amount _____

Charity _____

Bequest Amount _____

Charity _____

Bequest Amount _____

FUNERAL AND BURIAL ARRANGEMENTS

I have given instructions regarding my funeral in:

Will Letter Other

I own: Cemetery plot Cemetery vault None

Name, location _____

Phone _____

Section No. _____ Plot No. _____

Location of deed _____

Other funeral arrangements made _____

BANK ACCOUNTS AND SAFE DEPOSIT BOX

Checking Account:

Bank _____

Account Number _____

Joint Individual

Bank _____

Account Number _____

Joint Individual

Savings Account:

Bank _____

Account Number _____

Joint Individual

Safe Deposit Box Location

Box Number _____ Key Location _____

RETIREMENT ACCOUNTS

Company Name _____

Address _____

Account No. _____

Beneficiary _____

Company Pension _____

Social Security _____

Individual Retirement Account – 401(k) or 403(b) _____

Annuities _____

Beneficiary(ies) _____

Other retirement benefits _____

Beneficiary(ies) _____

INVESTMENTS

I own various stocks and bonds, held in street name, which are located at _____

Stocks/Bonds/Mutual Funds:

Company _____

Share _____

Cost Basis _____

Date Purchased _____

Company _____

Share _____

Cost Basis _____

Date Purchased _____

Company _____

Share _____

Cost Basis _____

Date Purchased _____

Records of purchase and sale are located at _____

I own U.S. Savings Bonds under the following ownership registrations:

My name alone Joint with _____

Type _____ Face Value _____

Issue Date _____ Maturity Date _____

Serial Number _____

Type _____ Face Value _____

Issue Date _____ Maturity Date _____

Serial Number _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Partnerships _____

TRUST FUNDS

Here are brief descriptions of my deposits:

1. Testamentary Trust

Trustee _____

Assets in the trust _____

Beneficiaries _____

Attorney of Record _____

Firm _____

Address _____

2. Charitable Remainder Trust

Trustee _____

Assets in the trust _____

Income Recipients _____

Charitable Beneficiaries _____

Papers are located _____

3. Existing Trust _____

I have created a trust for the benefit of

Date it was established _____

The Trust Agreement is located _____

The attorney who drafted the Trust Agreement is:

Firm _____

Address _____

I am a beneficiary under a Trust established by:

Papers are located _____

PERSONAL EMPLOYMENT

My employer is _____

Address _____

My employer has the following benefit plans in which I participate _____

I am presently covered by Social Security. Yes No

Other business interests _____

LIFE INSURANCE

All insurance policies owned by me on my life:

Insurance Company _____

Policy No. _____

Amount of policy _____

Location of policy _____

Beneficiary(ies) _____

Insurance policies owned by others on my life (including charities) _____

Insurance policies which I won on the lives of others:

Location of policies _____

Person insured _____

Address _____

My insurance agents or brokers are:

Name _____

Phone _____

Company & Address _____

Name _____

Phone _____

Company & Address _____

I have unpaid loans against these policies:

Policy No. _____

Amount due _____

OTHER INSURANCE

I personally carry accident, disability, sickness, hospitalization and other such forms of insurance – (this is in addition to and exclusive of any such insurance or benefits provided through my employer). Yes No

Company _____
Policy No. _____
Coverage _____
My insurance agent is _____
Phone _____
Location of policy(ies) _____

RESIDENCE AND OTHER REAL ESTATE

My residence address is _____

I own my residence Yes No

Ownership title is held in: _____
My name alone _____
Joint with _____

There is a mortgage on this property Yes No

It is held by _____
All of the documents concerning this property are located at _____

I own other real estate located at _____

My homeowner's insurance broker is _____
Firm _____
Address _____

TANGIBLE PERSONAL PROPERTY

Automobile(s) _____
Jewelry _____
Art, Antiques, Collectibles _____

Complete inventory of my personal property is located at _____

PERSONAL DEBTORS AND CREDITORS (OBLIGATIONS)

Name of Debtor _____
Address _____
Amount owed to me _____

Name of Debtor _____
Address _____
Amount owed to me _____

I have the following outstanding loans:

Creditor _____
Loan No. _____
Amount of Loan _____
Date of Final Payment _____

Creditor _____
Loan No. _____
Amount of Loan _____
Date of Final Payment _____

Credit Card Debt: _____
Company _____
Account No. _____
City _____ State _____
Phone _____

Company _____
Account No. _____
City _____ State _____
Phone _____

TAX RETURNS

My tax preparer is _____
Firm _____
Address _____
Copies of my income tax returns are located at _____

PERSONAL ADVISORS

Physician _____
Address _____
Specialty _____ Phone _____

Physician _____
Address _____
Specialty _____ Phone _____

Clergyperson _____
Address _____
Phone _____

Attorney _____
Address _____
Phone _____

Accountant _____
Address _____
Phone _____

Insurance Agent _____
Address _____
Phone _____

Trust Officer _____
Address _____
Phone _____

Investment Broker _____
Address _____
Phone _____

Tax Consultant _____
Address _____
Phone _____

Other _____
Address _____
Phone _____

LOCATION OF IMPORTANT PAPERS

Vital Statistics _____
Trust Agreements _____

Last Will & Testament _____
Bonds and Securities _____

Bank Books _____
Insurance Policies _____
Business Agreements _____

Titles & Deeds _____
Tax Papers _____
Charitable Documents _____

Military Service Documents _____

Others _____

A CHRISTIAN'S OPPORTUNITY

The Christian tradition of giving is both a privilege and an opportunity. What we now enjoy and cherish – our church, our schools, our hospitals – were in large part created by those who came before us. We all have the opportunity to follow this example by giving something of ourselves to assure the future of our Christian witness.

For additional copies of this booklet, please visit www.PresbyterianFoundationGroup.org or contact the Foundation at the address below.