

ORGANIZER

Sooner or later a busy person learns to write things down. It's the best way to capture things we are apt to forget. "The strongest memory," says an old proverb, "is weaker than the palest ink."

Into a **three ring binder** place a **photocopy** of the following:

1. Birth certificate, Car Title(s) **and location of all the following documents**
2. Marriage certificate
3. Divorce papers
4. Adoption papers of self or children
5. One check for each account maintained
6. One monthly statement of any Bank, Mutual Fund or Broker account maintained
7. List of all stocks and location of certificates, Dividend re-investment plans
8. Social Security card and insurance cards
9. Notices of benefits by Social Security - annual and death benefit
10. List of safe deposit boxes, CD's or US Savings Bonds with location
11. Annuities: issuer's name, location of documents, telephone number of agent
12. Cover sheet of all Life, Term, Mortgage, Loan, Umbrella or Long Term care policies and list of locations and any "cash value" statements or stock rights
13. All deeds of property and satisfactions of mortgage received from mortgage banks
14. Last Will and all codicils, Living Trust, Durable Power of Attorney, Living Will
15. Burial plot and funeral contracts
16. Pension notifications of amounts and terms and copy of form listing designated beneficiaries
17. Income tax records for previous four years (1040 and schedules)
18. All Gift tax returns filed (state and federal)
19. Business buy/sell agreements
20. Record of outstanding liabilities, credit cards and numbers and 800 telephone #s
21. List of relatives who may claim any interest against estate and addresses including zip code
22. Naturalization papers and notifications of any foreign pensions
23. List of any grandchildren adopted and illegitimate (sorry to offend you, but people have them)
24. Birth certificates and Soc. Sec. numbers of dependent children all addresses and phones
25. Honorable discharge papers - veteran burial benefit and plot allowance
26. Union death benefits, certificate for company paid life insurance and phone numbers
27. List and location of all safe deposit box keys and hiding places of cash in the house
28. Proposed Obituary

7/31/08

PLEASE NOTE ON THE COPY WHERE THE ORIGINAL DOCUMENT IS LOCATED. I SUGGEST A BANK SAFE DEPOSIT OR FIREPROOF HOME FILE BOX (AVAILABLE AT OFFICE SUPPLY STORES LIKE "STAPLES")

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