



VITAL DOCUMENTS MAP

[COMPLETE AND SAVE]

A major problem for anyone trying to settle an estate can be simply finding all the property and valuable papers. You can do yourself and your heirs and executor or successor trustee a favor by completing this form and giving copies to your spouse, other relatives who will help in settling the estate, and any outside executor or successor trustee. Provide a completed copy to our office to be kept with your permanent file. Update the information periodically. Our office will be happy to supply you with additional copies of this form upon request.

Name	Social Security Number	Date Completed
		/ /20__

WHERE TO LOOK

My valuable papers and assets are stored in these locations:

LOCATION	DESCRIPTION
A.	Residence: _____ <i>(Indicate Address and where to look)</i> <input type="checkbox"/> Fire-proof box in _____ room <input type="checkbox"/> Safe in _____ room <input type="checkbox"/> Other: _____ <i>(Describe)</i>
B.	Safe-deposit box: <i>(NOTE: Use of a safe-deposit box is not recommended in conjunction with estate plans involving revocable living trusts designed to avoid probate.)</i> _____ <i>(Name of Financial Institution) (Address)</i>
C.	Office: _____ <i>(Address plus where to look)</i>
D.	<i>(Describe)</i>

LOCATION

ITEM	A	B	C	D
My Will (Original)				
My Will (Copy)				
Power(s) of Attorney for Property				
Power(s) of Attorney for Health Care				
My burial instructions				
Cemetery plot deed				
Spouse's will (Original)				
Spouse's will (Copy)				
Spouse's burial instructions				
Children's guardianship designations				
List of special bequests, handwritten				
Safe combination, business				
Safe combination, home				
Trust agreements				
Life insurance, group				
Life insurance, individual				
Other death benefits				
Property and casualty insurance				
Health insurance policy				
Homeowners insurance policy				
Car insurance policy				
Employment contract(s)				
Partnership agreement(s)				
List of checking & savings accounts				
Bank statements, canceled checks				
List of credit cards				
Certificate(s) of deposit				

ITEM	A	B	C	D
Checkbooks				
Savings passbooks				
Record of investment securities				
Brokerage account records				
Stock certificates				
Mutual fund shares, records				
Bonds				
Other securities				
Corporate retirement plan				
Keogh or IRA Plan				
Annuity Contract				
Stock-option plan				
Profit-sharing plan				
Income and gift tax returns				
Titles, deeds to real estate and land				
Title insurance policy or policies				
Rental property records				
Notes and other loan agreements				
List of stored/loaned possessions				
Automobile ownership records				
Boat ownership records				
Birth certificate				
Citizenship papers				
Adoption papers				
Military discharge papers				
Marriage certificate				
Childrens' birth certificates				
Childrens' adoption papers				

ITEM	A	B	C	D
Divorce/separation records				
Names and addresses of relatives, friends				
Listing of professional and fraternal organization memberships				
OTHER [Use following lines to list other documents]:				

IMPORTANT NAMES

Title	Name	Address	Telephone
LAWYER	RALPH J. SCHUMANN	1701 EAST WOODFIELD ROAD SUITE 910 SCHAUMBURG, IL 60173	847.273.8700
ACCOUNTANT			
STOCKBROKER			
INSURANCE AGENT			

After completing, PROVIDE A COPY TO THIS OFFICE TO BE RETAINED WITH YOUR FILE, AND LIST OTHERS TO WHOM COPIES GIVEN: _____

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