

Client Information Summary for Estate Executors

Name	
-------------	--

Estate plan

Attorney	
Location of original documents	
Executor	
Trust name and date	
Trustee(s)	
Power of attorney	
Healthcare proxy	

Additional key contacts

Accountant	
Investment advisor	
Other	

Bank accounts

Bank(s)	
Account number(s)	
Approximate balance	

Safe deposit box

Bank name and address	
Box number	
Key location	

Mortgage

Bank or mortgage company	
Account number(s)	
Approximate balance	

Life insurance

Carrier	
Policy number(s)	
Type	
Death benefit	

Disability insurance

Carrier	
Policy number(s)	
Monthly benefit	

Investments *(List below or attach balance sheet)*

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Custodian(s)	
Account number(s) and type	
Approximate value	

Rental properties

Address	
Owner	
Notes	

Address	
Owner	
Notes	

Address	
Owner	
Notes	

Additional notes on rental properties

--

Additional notes for executors and advisors

A large, empty rectangular box with a thin black border, occupying most of the page below the section header. It is intended for handwritten or typed notes for executors and advisors.

Additional Information Only for Family Members

Mobile phone

Phone number	
Carrier	
Phone password	

Computer

Home computer password	
------------------------	--

Password manager

Password management system	
Username	
Master password	

Email

Email address	
Provider	
Password	

Additional notes for family members

--