

A frequent problem for survivors, when death has occurred, is simply finding all the property and valuable papers of the deceased. You can do your heirs and Executor a real favor by filling out this form and giving copies to your spouse, other relatives who might help in settling your estate, any outside Executor and your lawyer. Update the information periodically.

**Where Are My Assets?**

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

MARITAL STATUS:  NEVER MARRIED  MARRIED  WIDOWED  DIVORCED

SOCIAL SECURITY NUMBER \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ BIRTHPLACE \_\_\_\_\_

NAME OF FATHER \_\_\_\_\_ MAIDEN NAME OF MOTHER \_\_\_\_\_

USUAL OCCUPATION \_\_\_\_\_ KIND OF BUSINESS \_\_\_\_\_

NAME & ADDRESS OF LAST EMPLOYER \_\_\_\_\_

VETERAN:  IF YES, BRANCH OF SERVICE \_\_\_\_\_ WAR DATES \_\_\_\_\_

**MY VALUABLE PAPERS ARE STORED IN THE FOLLOWING LOCATIONS:**

(Be sure to add an address is necessary)

LOCATION A: \_\_\_\_\_

LOCATION B: \_\_\_\_\_

LOCATION C: \_\_\_\_\_

<u>ITEM</u>	<u>LOCATION</u>			<u>ITEM</u>	<u>LOCATION</u>		
	<u>A</u>	<u>B</u>	<u>C</u>		<u>A</u>	<u>B</u>	<u>C</u>
ORIGINAL WILL	—	—	—	CREDIT CARD LIST	—	—	—
COPY WILL	—	—	—	RETIREMENT PLAN INFO	—	—	—
SPOUSE'S ORIG. WILL	—	—	—	INCOME TAX PAPERS	—	—	—
POWER OF ATTORNEY	—	—	—	IRA, DEFERRED COMP.	—	—	—
LIVING WILL	—	—	—	CAR OWNERSHIP TITLE	—	—	—
TRUST AGREEMENT	—	—	—	DEEDS	—	—	—
SAFE COMBINATION	—	—	—	NOTES, MORTGAGES	—	—	—
LIFE INSURANCE	—	—	—	BIRTH CERTIFICATE	—	—	—
HEALTH INSURANCE	—	—	—	CHILDREN'S BIRTH CERTS	—	—	—
HOMEOWNER'S POLICY	—	—	—	MILITARY PAPERS	—	—	—
CAR INSURANCE POLICY	—	—	—	DIVORCE/SEP. INFO	—	—	—
CHECKING ACCT NO.	—	—	—	FUNERAL ARRANGEMENTS	—	—	—
SAVINGS ACCT NO.	—	—	—	OTHER ACCOUNT RECORDS	—	—	—

**IMPORTANT NAMES, ADDRESSES AND PHONE NUMBERS**

FAMILY MEMBERS \_\_\_\_\_

ATTORNEY BOLSTER & BRUDER, 168 Prospect Plains Road, Monroe Twp, NJ 08831 (609) 655-3200

ACCOUNTANT \_\_\_\_\_

FUNERAL HOME \_\_\_\_\_

DATE PREPARED \_\_\_\_\_

COPIES GIVEN TO \_\_\_\_\_

**PLANNING SHEET**

**TO THE NEXT OF KIN:** \_\_\_\_\_

This is an expression of my preferences and desires regarding the disposition of my remains and other arrangements at the time of my death. I am writing this to make things easier for you and to make my thoughts known.

**FUNERAL HOME:** I have made "pre-need" arrangements with: \_\_\_\_\_

**OR,** I have not made "pre-need" arrangements, but I prefer that you use the following funeral home: \_\_\_\_\_

**AT THE TIME OF MY DEATH, I PREFER:**

Conventional Burial.                       Cremation.     No Preference  
I would like to be buried in (type of clothing or uniform): \_\_\_\_\_

**MY PREFERENCE FOR A BURIAL PLACE OR DISPOSITION OF ASHES IS:**

Private Cemetery – print name and location: \_\_\_\_\_

National/Government Cemetery (contingent upon availability) –print name and location: \_\_\_\_\_

Burial at Sea.               Wherever you decide it would be easiest for you.               Other –print below: \_\_\_\_\_

In the event that my body should be shipped to another location, I prefer that the following funeral home be selected as "Receiving" funeral home—print name and location: \_\_\_\_\_

**I DESIRE THE FOLLOWING RELIGIOUS SERVICES BE CONDUCTED:**

Church services – print name and location: \_\_\_\_\_

Wake                       None                       One Day                       Two Days

Funeral Home    Memorial Service    Graveside Committal Service    Other –please print below \_\_\_\_\_

**MY PREFERENCE CONCERNING:**

**A.** Government furnished headstone or marker:                       YES                       NO  
If preferred, please indicate type: \_\_\_\_\_

**B.** Clergy – please provide name: \_\_\_\_\_

**C.** Flowers, memorials, agencies, contributions should be made to – please print below: \_\_\_\_\_

**D.** Favorite soloist or organist, psalms or other special requests – please print below: \_\_\_\_\_

**E.** Friends to notify – please print below: \_\_\_\_\_

**OTHER DESIRES OR NOTES:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
DATED: \_\_\_\_\_

SIGNATURE