



## Important Contacts List

### Executor of Trust

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Power of Attorney

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Attorney

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Accountant

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_



# Family Asset Inventory

**These are the items that Life Link Ledger will walk you through in the following pages. Relax and understand this will take time, don't get overwhelmed. Take it one step at a time**

## **Personal Identification & Vital Records**

- Birth certificates
- Passports
- Marriage certificate
- Divorce decrees
- Adoption papers
- Social Security cards
- Driver's licenses or state IDs
- Military service records
- Naturalization or citizenship papers
- Other vital personal records

## **Real Estate & Property**

- Primary residence
- Vacation homes or second properties
- Rental or investment properties
- Land or farmland
- Timeshares





# Family Asset Inventory

## **Vehicles & Transportation**

- Cars, trucks, SUVs
- Motorcycles, ATVs, RVs
- Boats, jet skis, trailers
- Aircraft
- Vehicle titles and registrations

## **Bank & Cash Accounts**

- Checking accounts
- Savings accounts
- Certificates of Deposit (CDs)
- Credit union accounts
- Safe deposit box contents

## **Investments & Securities**

- Stocks, bonds, mutual funds
- Brokerage accounts
- Exchange-Traded Funds (ETFs)
- Annuities
- Cryptocurrency wallets





# Family Asset Inventory

## **Retirement Accounts**

- 401(k), 403(b), 457 plans
- Traditional or Roth IRAs
- SEP or SIMPLE IRAs
- Pension plans
- Employer retirement benefits
- Military retirement accounts

## **Insurance Policies**

- Life insurance
- Health insurance
- Long-term care insurance
- Disability insurance
- Homeowner's or renter's insurance
- Auto insurance
- Umbrella liability insurance

## **Business Interests**

- Sole proprietorship assets
- Partnership agreements
- LLC or corporate shares
- Business bank accounts
- Business property or equipment





# Family Asset Inventory

## **Personal Property & Valuables**

- Jewelry, art, antiques, collectibles
- Firearms or sporting equipment
- Electronics
- Furniture or heirlooms of significant value

## **Debts & Liabilities**

- Mortgage(s)
- Home equity loans or HELOCs
- Auto loans
- Student loans
- Credit card balances
- Personal loans
- Business debts

## **Storage Units & Rentals**

- Storage unit rental agreements

## **Other Key Assets**

- Intellectual property
- Royalties or licensing agreements
- Prepaid funeral or burial arrangements
- Frequent flyer miles or reward program balances
- Memberships or subscriptions with transfer value





## Bank & Cash Accounts

**This section lists where the money is located.**

- Checking accounts
- Savings accounts
- Certificates of Deposit (CDs)
- Credit union accounts
- Safe deposit box contents





# Bank & Cash Accounts Form

**Use this form to record details for all bank and cash accounts.  
Fill out each section with accurate information and keep it updated.**

Institution Name: \_\_\_\_\_

Account Type (checking, savings, etc.): \_\_\_\_\_

Account Number: \_\_\_\_\_

Website / Online Banking URL: \_\_\_\_\_

Joint Owner(s): \_\_\_\_\_

Authorized Signers: \_\_\_\_\_

Beneficiary (if any): \_\_\_\_\_

Location of Records: \_\_\_\_\_

Contact Person / Phone Number: \_\_\_\_\_





## Funeral Wishes

### Personal Preferences

- Burial or Cremation \_\_\_\_\_
- Location of burial or scattering of ashes: \_\_\_\_\_
- Type of service (religious, non-religious, military honors, etc.):  
\_\_\_\_\_
- Preferred officiant, clergy, or celebrant: \_\_\_\_\_

### Funeral home or cemetery preference: Service Details

- Location of service: \_\_\_\_\_
- Type of service (traditional, memorial, celebration of life): \_\_\_\_\_
- Open or closed casket (if burial): \_\_\_\_\_
- Music, hymns, or songs: \_\_\_\_\_
- Readings, scriptures, or poems: \_\_\_\_\_
- Speakers or eulogists: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





## Funeral Wishes

### Burial or Cremation Details

- Preferred casket or urn: \_\_\_\_\_
- Clothing/jewelry to be worn: \_\_\_\_\_
- Headstone or marker inscription: \_\_\_\_\_
- Ashes to be (kept/scattered/buried/other): \_\_\_\_\_

### Memorial Items

- Flowers or donations in lieu of flowers: \_\_\_\_\_
  - Memorial program or remembrance cards: \_\_\_\_\_
  - Photos or slideshow: \_\_\_\_\_
  - Special symbols (flags, religious items, military honors): \_\_\_\_\_
- \_\_\_\_\_

### Financial & Practical

- Prepaid funeral plan details: \_\_\_\_\_
  - Insurance policy details: \_\_\_\_\_
  - People to notify: \_\_\_\_\_
- \_\_\_\_\_
- Obituary instructions: \_\_\_\_\_