

You and Your Family

- _____ Your full name
- _____ Date of birth
- _____ Social Security number
- _____ Spouse's full name
- _____ Spouse's Social Security number
- _____ Spouse's date of birth
- _____ Each child's full name
- _____ Each child's date of birth
- _____ Each child's Social Security number

Your Trustee

- _____ Trustee's name
- _____ Cotrustee's name
- _____ First successor trustee
- _____ Second successor trustee
- _____ Third successor trustee

Your Property and How It Is Titled

- _____ Residence
- _____ Other real estate
- _____ All bank accounts
- _____ Brokerage accounts
- _____ Individual stock certificates
- _____ Individual bonds
- _____ Vehicles, boats, campers, etc.
- _____ Other-list untitled assets

Your Beneficiaries

- _____ Life insurance
- _____ Disability income insurance
- _____ IRAs
- _____ Retirement plans
- _____ Annuities