



PERSONAL AFFAIRS CHECKLIST

PERSONAL/ FAMILY INFORMATION

- Full and legal name: _____
 - Maiden name: _____
 - Any variations on your name: _____

- Legal residence: _____
 - Years at this address: _____

- Telephone: _____

- Date/Place of birth: _____

- Sex: _____ Single: _____ Married: _____ Widowed: _____ Divorced: _____
 - If married, give full name of spouse: _____
 - Date and place of marriage: _____
 - If widowed, give full name of spouse and date and place of death: _____

 - If divorced, name of former spouse (address and phone, if still living):

- Name and birthplace of father (address and phone, if still living): _____

- Name and birthplace of mother, including maiden name (address and phone, if still living): _____

- Name, date of birth and social security # of each child (address and phone if living):

- Name of each brother and sister (address and phone, if living):

- Name, address and phone of other significant friends or relatives: _____

PROFESSIONAL RELATIONSHIPS

Attorney: _____

Accountant: _____

Financial
Planner: _____

Other: _____

IMPORTANT DOCUMENTS/INFORMATION

- Location of Digital Assets Checklist* or other list of passwords for digital assets:

*Digital Assets Checklist is available at
<http://www.rrlawpc.com/RCAB7S126/assets/files/News/Digital%20Assets%20Checklist.pdf>

- Location of Will and Codicils: original _____
Executor(s): _____
Successor Executor(s): _____
Location of Memorandum on Tangible Personal Property: _____
- Location of Trust Agreement and Amendments: _____
Initial Trustee(s): _____
Successor Trustee(s): _____
- Location of safe deposit box and key: _____
- Location of checkbooks: _____
- Location of stock and bond certificates: _____

ASSET/LIABILITY ACCOUNT INFORMATION

- Checking and Savings account numbers and institution:

- Investments, including account numbers and institution:

- Pensions, Annuities and IRAs – account number, institution, and address: person to contact:

- Life Insurance policies - policy numbers, locations, and address: person to contact:

- Location/address of all real estate owned and location of deeds:

- Credit cards including account numbers:

- Loans/ Mortgages including account numbers:
