

**INVENTORY MASTER INFORMATION LIST AS OF \_\_\_\_\_**

(Note: Attach additional sheets as needed)

**PERSONAL INFORMATION**

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Name

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Address

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Telephone No. (Home)

(Office)

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Social Security No.

DOB

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Are you Married?  Yes  No

If so, date of Marriage:

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Spouse:

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Address

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Telephone No. (Home)

(Office)

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Social Security No.

DOB

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Are there any prior wills or contract wills?

Yes  No

If so, please provide a copy.

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Do you have an existing marital property or  
prenuptial or postnuptial agreement?

Yes  No

If so, please provide a copy.

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**FINANCIAL INFORMATION**

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**Assets**

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Home

How titled or held

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When and how acquired?

Gross Value:

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Mortgage:

Net Value (less any mortgage/s):

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Other real estate (address/location, type)

How titled or held

---

When and how acquired?

Gross Value:

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Mortgage:

Net Value (less any mortgage/s):

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Other real estate (address/location, type)

How titled or held

When and how acquired?

Gross Value:

Mortgage:

Net Value (less any mortgage/s):

**Vehicles (Cars, Boats, RVs, etc.)**

Make/Model/Year

How titled or held

Gross Value:

Net Value (less any loan/s):

Loans

Make/Model/Year

How titled or held

Gross Value:

Net Value (less any loan/s):

Loans

Make/Model/Year

How titled or held

Gross Value:

Net Value (less any loan/s):

Loans

**Bank Accounts**

Name of Bank

Type of Account

Beneficiary Amount

Name of Bank

Type of Account

Beneficiary Amount

Name of Bank

Type of Account

Beneficiary Amount

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Do you have a Safe Deposit Box?  Yes  No

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If so, what bank and location of keys?

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**Life Insurance & Annuities**

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Name of Company Type of Policy/Plan

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Policy Owner Whose Life Insured

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Beneficiary Cash Surrender Value

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Acquired When Face Amount

---

Location of Documents

---

Name of Company Type of Policy/Plan

---

Policy Owner Whose Life Insured

---

Beneficiary Cash Surrender Value

---

Acquired When Face Amount

---

Location of Documents

---

Name of Company Type of Policy/Plan

---

Policy Owner Whose Life Insured

---

Beneficiary Cash Surrender Value

---

Acquired When Face Amount

---

Location of Documents

---

Name of Company Type of Policy/Plan

---

Policy Owner Whose Life Insured

---

Beneficiary Cash Surrender Value

---

Acquired When Face Amount

---

Location of Documents

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**Retirement Plans  
(e.g., HR10, IRA's, 401K, and Other  
Pension/Profit-Sharing Plans)**

Name of Company	Type of Policy/Plan
Title Holder	Acquired When
Beneficiary	Face Amount and/or Value

Name of Company	Type of Policy/Plan
Title Holder	Acquired When
Beneficiary	Face Amount and/or Value

**Investment Accounts & Digital Property  
(Stocks & Bonds)**

Name of Company	Type of Policy/Plan
Title Holder	Acquired When
Beneficiary	Face Amount and/or Value

Name of Company	Type of Policy/Plan
Title Holder	Acquired When
Beneficiary	Face Amount and/or Value

**Any Other Assets?  
(Including Personal Property)**

Please provide type of asset
Beneficiary

Please provide type of asset
Beneficiary

Have you received any significant gifts or inheritances?

Yes  No

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If so, indicate what value or what property was received, by whom, and when.

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Do you anticipate any substantial gifts or inheritance?

Yes  No

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If so, from whom and in what amount.

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**Personal Representative (aka Executor)**

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Who is your primary personal representative?

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Name

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Address

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Telephone No.

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Do you have a secondary personal representative?

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Name

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Address

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Telephone No.

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**Guardian**

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Who is your primary guardian?

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Name

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Address

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Telephone No.

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Do you have a secondary guardian?

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Name

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Address

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Telephone No.

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**Trustee (if applicable)**

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Who is named as your trustee?

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Name

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Address

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Telephone No.

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Anyone else named as trustee?

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Name

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Address

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Telephone No.

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**Durable Power of Attorney (Financial)**

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Who is named as your agent?

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Name

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Address

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Telephone No.

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Anyone else named as your agent?

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Name

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Address

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Telephone No.

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**Health Care Power of Attorney**

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Who is named as your health care agent?

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Name

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Address

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Telephone No.

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Anyone else named as your health care agent?

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Name

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Address

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Telephone No.

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Are there any prior powers of attorney documents?  Yes  No

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If so, please provide a copy.

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**Attach additional sheets as needed.**