Notes

This book was designed by Texas Attorney Elisse V. Woelfel to assist individuals with creating an inventory of their assets, insurance, debts, and other important information. When you are no longer able to manage your personal and business affairs due to disability or death, this information will provide a guide to the people who will be acting on your behalf. Once completed the information should be kept in a secure location where only trusted family members or friends have access.

The information should be updated regularly, so please consider using a pencil when completing the book or you may contact Ms. Woelfel at elisse@elisselaw.com, if you would like a digital version, which can be easily updated

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Name	
Address	
Telephone	
Social Security No.	
Date of Birth	
Spouse's Name	
Address	
Telephone	
Social Security No.	
Date of Birth	

Child & Dependent Information

Name and Date of Birth	Address	Phone

Notes

Estate Planning Documents

Last Will and Testament Date Signed: Executor: Location: Date Signed: Trust Date Signed: Trustee: Power of Location: Date Signed: Medical Location: POA Date Signed: Advance Directives Date Signed: HIPAA Location: Date Signed: HIPAA Release Date Signed: Declaration of Guardian Agent to Control Remains Location: Date Signed: Location: Date Signed: Location: Date Signed:		
Testament Date Signed: Executor: Location: Date Signed: Trust Date Signed: Trustee: Power of Attorney Date Signed: Medical Location: Date Signed: Medical Location: Date Signed: Advance Directives Date Signed: HIPAA Location: Date Signed: HIPAA Release Date Signed: Declaration of Guardian Date Signed: Location: Date Signed: Declaration of Guardian Date Signed: Location: Date Signed:		Location:
Executor: Location: Date Signed: Trustee: Power of Attorney Date Signed: Medical Location: POA Date Signed: Advance Directives Date Signed: HIPAA Release Date Signed: Declaration of Guardian Date Signed: Agent to Control Date Signed:		Date Signed:
Trust Date Signed: Trustee: Power of Attorney Date Signed: Medical POA Date Signed: Advance Directives Date Signed: HIPAA Release Date Signed: Declaration of Guardian Date Signed: Agent to Control Date Signed:	restarrent	Executor:
Trustee: Power of Attorney Date Signed: Medical Location: Date Signed: Advance Directives Date Signed: HIPAA Location: Date Signed: Declaration of Guardian Date Signed: Agent to Control Date Signed:		Location:
Power of Attorney Date Signed: Medical Location: Date Signed: Advance Directives Date Signed: HIPAA Release Date Signed: Declaration of Guardian Date Signed: Agent to Control Control	Trust	Date Signed:
Attorney Date Signed: Medical Location: Date Signed: Advance Location: Directives Date Signed: HIPAA Location: Release Declaration of Guardian Agent to Control Date Signed: Location: Date Signed: Location: Date Signed:		Trustee:
Attorney Date Signed: Medical Location: Date Signed: Advance Location: Directives Date Signed: HIPAA Location: Release Declaration of Guardian Agent to Control Date Signed: Location: Date Signed: Location: Date Signed:	Power of	Location:
Medical POA Date Signed: Advance Directives Date Signed: HIPAA Location: Date Signed: Declaration of Guardian Date Signed: Agent to Control Date Signed:		
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POA Date Signed: Advance Directives Date Signed: HIPAA Location: Date Signed: Declaration of Guardian Date Signed: Agent to Control Date Signed:	Modical	Location:
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HIPAA Location: Release Date Signed: Declaration of Guardian Date Signed: Agent to Control	7 10 10 11 10 11	Date Signed:
Release Date Signed: Declaration of Guardian Date Signed: Agent to Control		Date Signed.
Release Date Signed: Declaration of Guardian Date Signed: Agent to Control	HIPAA	Location:
Declaration of Guardian Location: Agent to Control	1	Date Signed:
Guardian Date Signed: Agent to Location:		Date Signed.
Guardian Date Signed: Agent to Location:	Declaration of	Location:
Agent to Location:		Date Signed:
Control		J. 1. 2 J. 1.
D 1 C: 1	_	Location:
Remains		Date Signed:
	Remains	3

Electronic Access

Other Websites and Accounts (Shopping, Utilities, Virtual Currency, Travel Booking, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Other Websites and Accounts (Shopping, Utilities, Virtual Currency, Travel Booking, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Spouse's Estate Planning Documents

	Location:
Last Will and Testament	Date Signed:
restarriere	Executor:
	Location:
Trust	Date Signed:
	Trustee:
Power of	Location:
Attorney	Date Signed:
Medical	Location:
POA	Date Signed:
Advance	Location:
Directives	Date Signed:
HIPAA	Location:
Release	Date Signed:
Declaration of	Location:
Guardian	Date Signed:
Agent to	Location:
Control Remains	Date Signed:

Important Documents and Information

Item	Location and Access
Adoption Papers	
Birth Certificates	
Prepaid Funeral Arrangements	
Divorce Papers	
Employee Benefits	
Marriage License	
Military Paperwork	
Passports	
Citizenship Documents	
Marital Agreements	
Real Estate Documents	
Safe Combination	
Safe Deposit Box and	
Social Security	
Tax Records	
Miscellaneous	

Electronic Access

Other Websites and Accounts (Shopping, Utilities, Virtual Currency, Travel, Award Accounts, Etc.)

virtual currency, Travel, Award Accounts, Etc.)		
Web Address	User Name or Email	Password and Security Q&A
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Video Accounts (Netflix, Hulu, YouTube, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Cloud Storage and Backup Accounts (Carbonite, Dropbox, Google Drive, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Advisors (Spiritual, Attorney, CPA, Etc.)

ype of Advisor:
lame:
Address:
Phone and Email:
Type of Advisor:
Name:
Address:
Phone and Email:
ype of Advisor:
lame:
Address:
Phone and Email:
Type of Advisor:
Name:
Address:
Phone and Email:

Assets

Bank and Credit Unions (Include Checking, Savings, Money Market, CDs, Etc.)		
Account Number	Owners of Account	
	Money Market, C Account	

Electronic Access			
Digital Photography and Music Accounts (Snapfish, Shutterbug, ITunes, Spotify, Etc.)			
Web Address	User Name or Email	Password and Security Q&A	

Social Media Accounts (Facebook, Twitter, Instagram, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Assets

Brokerage Accounts		
Institution	Account Number	Owners of Account

Retirement Accounts		
Institution	Account Number	Owner of Account

Assets

Employer Sponsored Retirement and Pension Accounts		
Employer	Account Number	Owner of Account

Education Accounts		
Institution	Account Number	Beneficiary of Account

Electronic Access

Financial Accounts		
Institution Name and Web Site	User Name or Email	Password and Security Q&A

Financial Accounts		
Institution Name and Web Site	User Name or Email	Password and Security Q&A

Assets

Real Property (Home, Rental Property, and Deeded Timeshares)		
Address	Owners Listed on Deed	Mortgage

Motorized Vehicles (Cars, Motorcycles, Watercraft, Airplanes, Etc.)		
Make, Model, and VIN	Owners Listed on Title	Loan

Assets

Significant Personal Property (Jewelry, Artwork, Collectibles, Antiques, Heirlooms, Etc.)		
Description and Information	Location	Approximate Value

Electronic Access

Email Accounts		
Email Provider and Web Address	Email Address or User Name	Password

Notes

Electronic Devices (Computer, Tablet, Phone, Etc.)		
Device	User Name	Password

Notes

Insurance

Medical Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:
Prescription Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:
Supplemental Insurance:
Policy Number:
insured:
Claims Address and Phone Number:
Dental Insurance:
Policy Number:
Insured:

Insurance

Vision Insurance:	
Policy Number:	
Insured:	
Claims Address and Phone Number:	
Homeowners' Insurance:	
Policy Number:	
Policy Limits:	
Claims Address and Phone Number:	
Umbrella Insurance:	
Policy Number:	
Policy Limits:	
Claims Address and Phone Number:	
Automobile Insurance:	
Policy Number:	
Policy Limits:	
Claims Address and Phone Number:	

Debts

Debts (Credit Cards, Personal Loans, Student Loans, Lines of Credit, Etc.)		
Name of Lender and Type of Account	Names on Account	Account Number

Debts

Debts (Credit Cards, Personal Loans, Student Loans, Lines of Credit, Etc.)		
Name of Lender and Type of Account	Names on Account	Account Number

Insurance

Life Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:
Life Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:
Life Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Insurance

AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:
AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:
AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Insurance

Other Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	
Other Insurance:	
Insured:	

Notes

Policy Limits:

Policy Number:

Agent's Address and Phone:

Insurance

Short Term Disability Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	
Long Term Disability Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	
Long Term Disability Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	

Insurance

Long Term Care Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	
Long Term Care Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	
Short Term Disability Insurance:	
Insured:	
Policy Limits:	
Policy Number:	
Agent's Address and Phone:	