

# An Organized (after)Life

helping you make your death as organized as your life

## ASSET CHECKLIST

You are the expert in your own assets. This guide is to help you list the assets you have, confirm their ownership and make changes if needed. Save this letter for future reference. This list can help you keep current as to the assets you have and assist anyone who may need to know later.

Bank Accounts

Institution and Type	Account Number	Ownership	POD, if any
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Life Insurance

Company	Account Number	Ownership	Beneficiary Designation
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Retirement Accounts

Company	Account Number	Ownership	Beneficiary Designation
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Vehicles

Make, Model, Year	Ownership ("or")	TOD, if any	Lien, if any
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Stocks, Bonds And Mutual Funds

Company	Account or Stock Info	Ownership	TOD, if any
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Real Estate

County and Tax ID	Ownership	TODD, if any	Lien, if any
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

Trusts

Name	Role (trustee, beneficiary)	Trustee at My Death
-----	-----	-----
-----	-----	-----

Business Documents

Name	Role (owner, officer)	Location of Docs
-----	-----	-----
-----	-----	-----

Veteran's Benefits

Branch	Location of Discharge Papers
-----	-----
-----	-----

Employee Benefits

Employer	Benefit	Contact Info
-----	-----	-----
-----	-----	-----

Miscellaneous

-----  
 -----  
 -----