

Beneficiary planner

You can fill out this form so that your beneficiaries, the people who receives your assets, have all the details of your estate plan in one convenient place.

Personal information

Your details

Name	Address	Date of birth
Place of birth	SSN	Mother's maiden name

Family

Marital status	Spouse's name	Spouse's maiden name
Spouse's phone number	Children's names	Phone numbers

Pets

Pet's name	Animal/Breed	Veterinarian name
Medication	Veterinarian contact info	

Work and employment

Employment status	Employer	Address
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Military service

Veteran serial #	Service branch	Date of discharge
Rank at discharge	Location of discharge papers	

Documents

Location of

Last will and testament	Birth certificate	Marriage certificate
Safe deposit box	Safe deposit key	

Attorney and advisors

Attorney	Account	Financial advisor
Trustee		

Insurance policies

Life insurance company	Policy number	Contact info
Policy location		Amount
Disability insurance company	Policy number	Contact info
Home insurance company	Policy number	Contact info
Car insurance company	Policy number	Contact info

Financial inforamtion

Bank accounts

Savings	Bank name	Account no.
Checking	Bank name	Account no.
Money market	Bank name	Account no.
CD	Bank name	Account no.

Credit cards

Company	Card number	User ID and password
Company	Card number	User ID and password

Retirement plans and pensions

Plan type	Company/broker	Account info
Plan type	Company/broker	Account info

Investments

Stocks	Company/broker	Account info
Bonds	Company/broker	Account info

Loans and debts

Type of debt	Servicer/company	Account number
User ID and password		

Property

Real estate

Property type	<input type="checkbox"/> Primary residence <input type="checkbox"/> Rental	<input type="checkbox"/> Commercial <input type="checkbox"/> Time share
Address	Location of deed	Mortgage info

Property type	<input type="checkbox"/> Primary residence <input type="checkbox"/> Rental	<input type="checkbox"/> Commercial <input type="checkbox"/> Time share
Address	Location of deed	Mortgage info

Property type	<input type="checkbox"/> Primary residence <input type="checkbox"/> Rental	<input type="checkbox"/> Commercial <input type="checkbox"/> Time share
Address	Location of deed	Mortgage info

Vehicles

Model	Make	Year
Location		

Model	Make	Year
Location		

Model	Make	Year
Location		