

# ASSET LOCATOR

Directions to Family, Personal Representatives and Executor

of \_\_\_\_\_

Address: \_\_\_\_\_

In order that my personal representatives, executors, etc. may be aware of the location of my assets, and my desires concerning my funeral home, I have filled out the following questionnaire.

1. I have a safe deposit box at: \_\_\_\_\_

The following persons in addition to myself are authorized to enter the safe deposit box:

\_\_\_\_\_

2. My Last Will and Testament is kept: \_\_\_\_\_

3. I have checking accounts at the following banks:

Bank	Branch	Location	Individual or Joint If Joint, Name of Other Party
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. I have savings accounts or certificates of deposits at the following banks or Savings and Loan Institutions:

Bank or Savings & Loan	Branch	Location	Individual or Joint If Joint, Name of Other Party
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

5. I have U.S. Government Savings Bonds which are kept: \_\_\_\_\_  
and which are (jointly or individually owned. The Ownership on the jointly held Bonds is as follows:

\_\_\_\_\_  
\_\_\_\_\_

6. I own the following real estate:

Description (e.g., Home, Cabin, Lot)	Location: (Co., City, Boro., Township)	Deed Reference	Individual or Joint If Joint, Name of Other Party
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

7. I own the following stocks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My stocks are kept: \_\_\_\_\_

My stockbroker's name is: \_\_\_\_\_

Address: \_\_\_\_\_

8. My Accountant or Income Tax Preparer is: \_\_\_\_\_

Address: \_\_\_\_\_

9. I have interest in the following business:

Name of Business	Location	Nature of Interest
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_____	_____	_____
_____	_____	_____
_____	_____	_____

10. I own the following assets not listed elsewhere:

Nature	Location	Nature of Ownership
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

11. I own the following life insurance:

Insurance Company	Policy Number	Insurance Agent	Agent's Address
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

My policies are located: \_\_\_\_\_

12. I carry automobile insurance with \_\_\_\_\_ Insurance Company,

My auto insurance agent is: \_\_\_\_\_

Address: \_\_\_\_\_

13. All of the casualty, fire, theft, etc. insurance on my personal property is located:

\_\_\_\_\_

My insurance agent for these policies is: \_\_\_\_\_

Address: \_\_\_\_\_

My policies are located: \_\_\_\_\_

14. I am a participant in a  Pension,  Profit Sharing,  Credit Union,

Other \_\_\_\_\_ Plan at: \_\_\_\_\_

15. My Birthdate is: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Spouse's Name is: \_\_\_\_\_

Spouse's Birthdate: \_\_\_\_\_ Spouse's Social Sec. No.: \_\_\_\_\_

Children's Names	Birthdate	Address
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

16. I have made funeral arrangements, or prefer they be made with: \_\_\_\_\_

\_\_\_\_\_

17. I own cemetery lots at: \_\_\_\_\_

18. I have ordered a memorial stone from: \_\_\_\_\_

It (is, is not) placed on my cemetery lot.

19. Miscellaneous Information:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(Signature) \_\_\_\_\_ (Date) \_\_\_\_\_