



VITAL DOCUMENTS MAP

[COMPLETE AND SAVE]

A major problem for anyone trying to settle an estate can be simply finding all the property and valuable papers and data. You can do yourself and your heirs and executor or successor trustee a favor by completing this form and giving copies to your spouse, other relatives who will help in settling the estate, and any outside executor or successor trustee. Provide a completed copy to our office to be kept with your permanent file. Update the information periodically. Our office will be happy to supply you with additional copies of this form upon request.

Name	Date
	_____, 20____

WHERE TO LOOK

My valuable papers and assets are stored in these locations:

LOCATION	DESCRIPTION
A.	Residence: _____ <i>(Indicate Address and where to look)</i> <input type="checkbox"/> Fire-proof box in _____ room <input type="checkbox"/> Safe in _____ room <input type="checkbox"/> Other: _____ <i>(Describe)</i>
B.	Safe-deposit box: <i>NOTE: Use of a safe-deposit box is not recommended in conjunction with estate plans involving revocable living trusts designed to avoid probate.</i> Consider using one of the Location A Options, above. _____ <i>(Name of Financial Institution) (Address)</i>
C.	Office: _____ <i>(Address plus where to look)</i>
D.	Other: _____ <i>(Describe)</i>

Provided as a Service By:

LAW OFFICES OF RALPH J. SCHUMANN

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LOCATION

ITEM	A	B	C	D
My Will (Original)				
My Will (Copy)				
Power(s) of Attorney for Property				
Power(s) of Attorney for Health Care				
My burial instructions				
Cemetery plot deed				
Spouse's will (Original)				
Spouse's will (Copy)				
Spouse's burial instructions				
Children's guardianship designations				
List of special bequests, handwritten				
Safe combination, business				
Safe combination, home				
Trust agreements				
Life insurance, group				
Life insurance, individual				
Other death benefits				
Property and casualty insurance				
Health insurance policy				
Homeowners insurance policy				
Car insurance policy				
Employment contract(s)				
Partnership agreement(s)				
List of checking & savings accounts				
Bank statements, canceled checks				
List of credit cards				
Certificate(s) of deposit				

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Checkbooks				
Savings passbooks				
Record of investment securities				
Brokerage account records				
Stock certificates				
Mutual fund shares, records				
Bonds				
Other securities				
Corporate retirement plan				
Keogh or IRA Plan				
Annuity Contract				
Stock-option plan				
Profit-sharing plan				
Income and gift tax returns				
Titles, deeds to real estate and land				
Title insurance policy or policies				
Rental property records				
Notes and other loan agreements				
List of stored/loaned possessions				
Automobile ownership records				
Boat ownership records				
Birth certificate				
Citizenship papers				
Adoption papers				
Military discharge papers				
Marriage certificate				
Childrens' birth certificates				
Childrens' adoption papers				
Divorce/separation records				
Names and addresses of relatives, friends				

Vital Documents Map: Page 4 of 4

Listing of professional and fraternal organization memberships				
Listing of digital assets				
OTHER [Use following lines to list other documents]:				

IMPORTANT CONTACT INFORMATION

Title	Name	Address	Telephone
LAWYER	RALPH J. SCHUMANN	1701 EAST WOODFIELD ROAD SUITE 910 SCHAUMBURG, IL 60173	847.273.8700
ACCOUNTANT			
STOCKBROKER			
INSURANCE AGENT			

After completing, PROVIDE A COPY TO THIS LAW OFFICE TO BE RETAINED WITH YOUR FILE, AND LIST OTHERS TO WHOM COPIES GIVEN: _____

A completed copy of this Vital Documents Map has been provided to my attorney:

(Check one.)

- Yes Date: _____, 20__
- No

This Vital Documents Map

(Check one.)

- Does
- Does Not

include a *Digital Assets Guide*.

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DIGITAL ASSETS GUIDE

TO ASSIST IN ESTATE PLANNING

Confidential: If Completed, Keep In a Safe Place

Use This Form With Caution: Do not allow your personal information to be compromised.

	Partner No. 1 (e.g., Husband)	Partner No. 2 (e.g., Wife)
Name:		
Residence:	_____ _____ _____	_____ _____ _____
Home Phone Number		
Voice Mail Password:		
Cell Phone Number		
Cell Phone Password		
Voicemail #		
Voicemail Password		
<u>Computers:</u>		
Home Computer No. 1		
User name:	_____	_____
Password:	_____	_____
Additional User Names &	_____	_____
Passwords:	_____	_____

Home Computer No. 2 User name: Password: Additional User names & Passwords:	_____ _____ _____ _____	_____ _____ _____ _____
Office Computer No. 1 User name: Password: Additional User names & Passwords:	_____ _____ _____ _____	_____ _____ _____ _____
Office Computer No. 2 User name: Password: Additional User names & Passwords:	_____ _____ _____ _____	_____ _____ _____ _____
<u>E-mail Accounts:</u>		
e-mail (home): Provider URL: User name: Password: Two-Factor Authentication?	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No
e-mail (work): Provider URL: User name: Password: Two-Factor Authentication?	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No

e-mail (other): Provider URL: User name: Password: Two-Factor Authentication?	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ _____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Social Networking:</u>		
LinkedIn: User name Password	_____ _____	_____ _____
Facebook: User name Password	_____ _____	_____ _____
My Space: User name Password	_____ _____	_____ _____
Twitter: User name Password	_____ _____	_____ _____
WhatsApp: User name Password	_____ _____	_____ _____
YouTube: User name Password	_____ _____	_____ _____
<u>Financial Programs:</u>		
Quicken User name: Password:	_____ _____	_____ _____

Microsoft Money User name: Password:	_____ _____	_____ _____
Other: User name: Password:	_____ _____	_____ _____
<u>Financial Accounts:</u>		
ATM/Debit Card #1 Card Number: PIN:	_____ _____	_____ _____
ATM/Debit Card #2 Card Number: PIN:	_____ _____	_____ _____
Bank Account #1 Bank Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Bank Account #2 Bank Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____

Brokerage Account #1 Financial Institution Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Brokerage Account #2 Financial Institution Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Mutual Fund Account #1 Broker Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Mutual Fund Account #2 Broker Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____

<u>Online Shopping & Auction Accounts:</u>		
Account Name (e.g. Amazon, Craigslist, eBay, PayPal, etc.): Website: User name: Password:	_____ _____ _____ _____	_____ _____ _____ _____
Account Name: Website: User name: Password:	_____ _____ _____ _____	_____ _____ _____ _____
<u>Tax Preparation Software:</u>		
Turbo Tax: User name: Password:	_____ _____	_____ _____
H & R Block Tax Prep: User name: Password:	_____ _____	_____ _____
[Other] Tax Prep: User name: Password:	_____ _____	_____ _____

<u>Credit Cards:</u>		
Credit Card #1 Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Credit Card #2 Name: Account Number: Web Address: User name: Password:	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
<u>Domain Names:</u>		
Domain Name & Registrar: Host Username: Password(s):	_____ _____ _____	_____ _____ _____
Other (Flickr, Snapfish, etc.) Web Site: User name: Password:	_____ _____ _____ _____	_____ _____ _____ _____

<u>Online or "Cloud" Storage:</u>		
Carbonite: Web site User name: Password:	_____ _____ _____	_____ _____ _____
Dropbox: Web site User name: Password:	_____ _____ _____	_____ _____ _____
Apple iCloud: Web site User name: Password: Two-Factor Authentication?	_____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ _____ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No
Google Drive: Web site User name: Password:	_____ _____ _____	_____ _____ _____
Microsoft Web site User name: Password:	_____ _____ _____	_____ _____ _____
[Other:] Web site User name: Password:	_____ _____ _____	_____ _____ _____