

Planning Beyond the Will

Valuables



Storage Information

Do you have a safe deposit box?

Yes

No

If yes, name of bank, branch, and location:

Who is named on the signature card?

Do all parties named on the signature card have a key?

Yes

No

Account number:

Box number:

Key location:

Any other items to note:

Do you have a safe deposit box?

Yes

No

If yes, name of bank, branch, and location:

Who is named on the signature card?

Do all parties named on the signature card have a key?

Yes

No

Account number:

Box number:

Key location:

Any other items to note:

Storage Information (continued)

Do you have a safe?

Where is it located?

Where do you keep the key?

Does anyone else have a key or the combo?

Do you have a storage unit?

Yes

No

If yes, what is the name of the storage unit?

Address:

Key location or lock combination:

Payment information (including method, frequency, amount):

Special instructions:

Heirlooms / Artwork

1. Description of item:

Location:

Special instructions:

2. Description of item:

Location:

Special instructions:

3. Description of item:

Location:

Special instructions:

4. Description of item:

Location:

Special instructions:

Heirlooms / Artwork (continued)

- 5.** Description of item:
Location:
Special instructions:

- 6.** Description of item:
Location:
Special instructions:

Books

- 1.** Name of book:
Location:
Special instructions:

- 2.** Name of book:
Location:
Special instructions:

- 3.** Name of book:
Location:
Special instructions:

- 4.** Name of book:
Location:
Special instructions:

- 5.** Name of book:
Location:
Special instructions:

- 6.** Name of book:
Location:
Special instructions:

Books (continued)

7. Name of book:

Location:

Special instructions:

8. Name of book:

Location:

Special instructions:

9. Name of book:

Location:

Special instructions:

10. Name of book:

Location:

Special instructions:

Jewelry

1. Description of item:

Location:

Special instructions:

2. Description of item:

Location:

Special instructions:

3. Description of item:

Location:

Special instructions:

4. Description of item:

Location:

Special instructions:

Jewelry (continued)

- 5.** Description of item:
Location:
Special instructions:

- 6.** Description of item:
Location:
Special instructions:

Wine / Spirits

- 1.** Bottle information (producer, varietal, year, etc.):
Bottle location:
Special instructions:
Anything else to note:

- 2.** Bottle information (producer, varietal, year, etc.):
Bottle location:
Special instructions:
Anything else to note:

- 3.** Bottle information (producer, varietal, year, etc.):
Bottle location:
Special instructions:
Anything else to note:

- 4.** Bottle information (producer, varietal, year, etc.):
Bottle location:
Special instructions:
Anything else to note:

- 5.** Bottle information (producer, varietal, year, etc.):
Bottle location:
Special instructions:
Anything else to note:

Wine / Spirits (continued)

6. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

7. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

8. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

9. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

10. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

11. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

12. Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

Collection(s) / Musical Instruments / Other

1. Description:
Location:
Special instructions:

2. Description:
Location:
Special instructions:

3. Description:
Location:
Special instructions:

4. Description:
Location:
Special instructions:

5. Description:
Location:
Special instructions:

6. Description:
Location:
Special instructions:

7. Description:
Location:
Special instructions: