**SCHEDULE OF PERSONAL ASSETS & FINANCES for [Name]**

* The house at [Address] – *Security Deed is in the safe*
* Vehicle Make & Model *(Title is in the safe)*
* Asset
* Asset
* Asset
* Financial Advisor Information

Name, Company

Address

Email Address

Phone Number(s)

**Life Insurance Policies / Financial Assets:**

* Life Insurance Company: [Amount] – Contact Name, Phone Number
* Life Insurance Company: [Amount] – Contact Name, Phone Number
* Contact [Financial Advisor Name] for Investment Beneficiary Info (see contact information above)
* Social Security Benefits - Call Social Security Services (Benefits may or may not be transferrable) – Call (855) 257-0067

**List of Current Creditors** (note: all creditors are paid online via [bank/credit union]) See Keeper.

Monthly Billing statements are in [location, folder name, etc.]

* Creditor
* Creditor
* Creditor

Discontinue auto-payment from checking account for the following:

* Payee
* Payee
* Payee

Discontinue monthly donations for the following on their websites:

1. Organization
2. Organization
3. Organization

**Additional Info**

* Key to Safe is [location] **- Include the address as well**
* iPhone Unlock:
* Keeper App Master Code: