

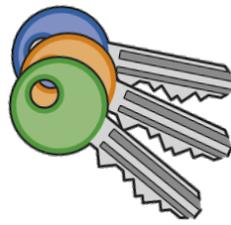
Vital Family Information Packet

Updated As Of:





LOCATION OF



INFORMATION

<p>Location of Estate Planning Documents including wills, living trust, powers of attorney, healthcare directive, etc. [advisable to keep copy in home office with note attached listing where original kept (typically with attorney or safe deposit box)]</p>		<p>Copy sent to Beacon Pointe for Client View Document Vault?</p>	
<p>Location of bank statements</p>		<p>Location of username and password if receive statements online</p>	
<p>Address of bank where safe deposit boxes are held</p>		<p>Location of key(s)</p>	
<p>Location of funeral plots or other burial information</p>			
<p>Location of other important documents</p>			
<p>Location of brokerage/ investment account statements</p>		<p>Location of username and password if receive statements online</p>	
<p>Location of credit card statements</p>		<p>Location of username and password if receive statements online</p>	
<p>Location of email usernames and passwords</p>			



EMERGENCY CONTACTS

Name	Telephone Number	Specialty	Additional Information
Doctors			
Dentists			
Attorneys			



EMERGENCY CONTACTS

Name	Telephone Number	Specialty	Additional Information
Employers/ Business Partners			
Bankers			
Financial Advisors			
CPAs			



LIST OF ASSETS

Type of Asset	Location of Asset	Contact Person Regarding Asset	Telephone Number	General Value	Notes
Business Interests					
Life Insurance					
Personal Property (i.e. Vehicles, Jewelry, Art, Collectibles)					

