

Vital Family Information Packet



LOCATION OF KEY INFORMATION

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)]		Copy sent to Beacon Pointe for Client View Document Vault?	
Location of bank statements		Location of username and password if receive statements online	
Address of bank where safe deposit boxes are held		Location of key(s)	
Location of funeral plots or other burial information			
Location of other important documents			
Location of brokerage/ investment account statements		Location of username and password if receive statements online	
Location of credit card statements		Location of username and password if receive statements online	
Location of email usernames and passwords			

SAFE DEPOSIT BOX INVENTORY LIST

We suggest keeping a copy of this list also in your safe deposit box and updating it each time you add or remove an item.

Name Of Item	Description	Date Added	Date Removed

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
Bank Accounts					
Stock/ Brokerage Accounts					

LIST OF ASSETS

Type of Asset	Location of Asset	Contact Person Regarding Asset	Telephone Number	General Value	Notes
Real Estate					
Notes Receivables					

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)					

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Type of Asset	Location of Asset	Contact Person Regarding Asset	Telephone Number	General Value	Notes