

Estate Care Organizer Prepared for:

This Estate Care Organizer is designed to help you organize your financial documents, serve as a personal record keeping organization tool, and assist with your estate planning, financial planning and probate process. It should not be construed as encompassing all of the legal or financial decisions involved in estate planning or estate administration. You should always consult an attorney and/or tax advisor regarding the legal and financial decisions involved in estate planning and probating or administrating an estate.

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Walsh-Copeland Consulting, LLC 15530 Ashbury Church Road Purcellville, VA 20132 www.EstateCareOrganizer.com

<u> </u>	NANNANNANNANNANNANNANNANNANNAN	
For: Client Name          Name         Relationship         Address         Email         Phone #1         Phone #2         Knows about Estate         Care Organizer?         Name         Relationship         Address         Email         Phone #1         Phone #1         Phone #1         Phone #1         Phone #1         Phone #2         Knows about Estate         Care Organizer?         Name         Relationship         Address         Email         Phone #1         Phone #2         Knows about Estate         Care Organizer?         Name         Relationship         Address         Email         Phone #1         Phone #2         Knows about Estate         Care Organizer?	Estate Care Organizer	Date, Year
		,
In the event	of accident, illness, incapacitation or death, please contact:	
Name		
Relationship		
Address		
Email		
Phone #1		
Phone #2		
Knows about Estate		
Care Organizer?		
Name		
Relationship		
Address		
Email		
Phone #1		
Phone #2		
Knows about Estate		
Care Organizer?		
Name		
Relationship		
Address		
Email		
Phone #1		
Phone #2		
Knows about Estate Care Organizer?		
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	ESTATE ESSENTIALS
PERSONAL / BIOGRAPHICAL INFO	ORMATION
Personal Information	
Full (Legal) Name	
A.K.A. (Also Known As)	
Address	
P.O. Box / Location	
Phone 1	
Phone 2	
Email	
Spouse/Partner(s)	
Full (Legal) Name	
A.K.A. (Also Known As) Address	
P.O. Box / Location	
Phone 1	
Phone 2	
Email	

Second colspan="2">Contact # Signed         Prepared by         Email         Address         Mame / For         Prepared by         Email         Address         Address         Address         Name       Relationship         Contact #'s       Email       Address         Address         Name       Relationship       Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         Name       Relationship       Contact # Signed       Coces?         Trustee Name       Relationship       Contact # Signed       Copies?         AddressPhane       Contact # Signed       Copies?         AddressPhane       Contact # Signed <td colspa<="" th=""><th>lills</th><th></th><th></th><th></th><th>-</th></td>	<th>lills</th> <th></th> <th></th> <th></th> <th>-</th>	lills				-
Executor(s)       Image: Contact #'s       Email       Address         Alternate Executor(s)       Image: Contact #'s       Email       Address         Alternate Executor(s)       Image: Contact #'s       Email       Address         Beneficiaries       Image: Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         Beneficiaries       Image: Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         Image: Contact #'s       Email       Address       Image: Contact #'s       Image: Contact #'s         Image: Contact #       Image: Contact #       Email       Address         Image: Contact #       Email       Address       Image: Contact #       Image: Contact #         Image: Contact #       Email       Address       Image: Contact #       Image: Contact #       Image: Contact #       Image: Contact #         Address       Image: Contact #       Email       Address       Image: Contact #       Im	Name / For	Date Signed	Prepared by	Email	Location Originals & Copie	
Executor(s)       Contact #'s       Emili       Address         Alternate Executor(s)						
Name       Relationship       Contact #'s       Email       Address         Alternate Executor(s)	Executor(s)					
Alternate Executor(s)       Alternate Executor(s)         Name       Relationship       Contact #'s       Email         Beneficiaries       Address         Name       Relationship       Contact #'s       Email         Mame       Relationship       Contact #'s       Email         Name       Relationship       Contact #'s       Email         Name       Relationship       Contact #'s       Email         Name/For       Trust Type       Date Signed       Location Original?         Trustee Name       Relationship       Contact #       Email         Alt Trustee Name       Relationship       Contact #       Email         Alt Trustee Name       Relationship       Contact #       Email         Address	Name	Relationship	Contact #'s	Email	Address	
Alternate Executor(s)       Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         Beneficiaries						
Name       Relationship       Contact #'s       Email       Address         Beneficiaries	Alternate Executor(s)					
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Beneficiaries       Contact #'s       Email       Address         Name       Relationship       Contact #'s       Email       Address         rusts       Image: Contact # Email       Address         Name/For       Trust Type*       Date Signed       Location Original? Copies?         Trustee Name       Relationship       Contact # Email       Address         Alt Trustee Name       Relationship       Contact # Email       Address         Alt Trustee Name       Relationship       Contact # Email       Address         Address/Phone/Contacts list       Imail       Address       Document locati         Address/Phone/Contacts list       Imail       Email       Address         Address       Imail       Email       Email       Contact # Contact         Address       Imail       Imail       Imail       Contact       Imail         Address       Imail       Imail       Imail       Imail       Imail       Imail         Address       Imail       Imail </td <td></td> <td></td> <td></td> <td></td> <td></td>						
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rusts         Name/For       Trust Type*         Date Signed       Copies?         Trustee Name       Relationship         Contact #       Email         Alt Trustee Name       Relationship         Contact #       Email         Alt Trustee Name       Relationship         Contact #       Email         Alt Trustee Name       Relationship         Contact #       Email         Address       Document location         Address/Phone/Contacts list       Address         Adoption records       Imail         Baptismal Certificate       Imail         Birth Certificate       Imail         Birth Certificate       Imail         Child ID Records/ID       Imail	Name	Relationship	Contact #'s	Email	Address	
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Instant       Trust Type*       Date Signed       Location Original? Copies?         Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact # s/       Email       Address         Address/Phone/Contacts list						
Name/For       Trust Type*       Date Signed       Location Original? Copies?         Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         ersonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list       Address       Document location       Information       Information         Adoption records       Information       For:       Email       Information       Information         Baptismal Certificate       Information       Information       Information       Information       Information         Child ID Records/ID       Information       Information       Information       Information	rusts					
Name/For       Trust Type*       Date Signed       Copies?         Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Versonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list       Address       Imail       Address       Document location         Adoption records       Imail       Imail       Imail       Imail       Imail         Baptismal Certificate       Imail       Imail       Imail       Imail       Imail       Imail         Child ID Records/ID       Imail       Imail <td< td=""><td></td><td></td><td></td><td>Location Original?</td><td></td></td<>				Location Original?		
Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         ersonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list       Adoption records       Image: Contact #'s/ Email       Image: Contact #'s/ Adoption records       Image: Contact #'s/ Email       Image: Contact #'s/ Address         Baptismal Certificate       Image: Contact #'s/ Email       Image: Contact #'s/ Adoption records       Image: Contact #'s/ Email       Image: Contact #'s/ Address         Baptismal Certificate       Image: Contact #'s/ Email	Name/For	Trust Type*	Date Signed	Copies?		
Industrie       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         Alt Trustee Name       Relationship       Contact #       Email       Address         ersonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list	Trucker Marrie	Dalatharakia	O and a shift	E	Address	
Alt Trustee Name       Relationship       Contact #       Email       Address         ersonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list       Imail       Address       Document location         Adoption records       Imail       Imail       Imail       Imail         Baptismal Certificate       Imail       Imail       Imail       Imail         Child ID Records/ID       Imail       Imail       Imail       Imail       Imail	Irustee Name	Relationship	Contact #	Email	Address	
ersonal Information     For:     Contact #'s/ Email     Address     Document location       Address/Phone/Contacts list     Address     Document location       Adoption records     Image: Contact ficate     Image: Contact ficate       Baptismal Certificate     Image: Contact ficate     Image: Contact ficate       Birth Certificate - all family     Image: Contact ficate     Image: Contact ficate	Alt Trustee Name	Relationship	Contact #	Email	Address	
Personal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list						
ersonal Information     For:     Contact #'s/ Email     Address     Document location       Address/Phone/Contacts list						
Contact #'s/ Errsonal Information       For:       Contact #'s/ Email       Address       Document location         Address/Phone/Contacts list				1		
Address/Phone/Contacts list     Entern     Address       Adoption records     Image: State	ersonal Information	For <sup>.</sup>	Contact #'s/ Email	Address	Document location	
Adoption records	Address/Phone/Contacts lis	st	Lindi	/ 44/000		
Baptismal Certificate	Adoption records					
Birth Certificate - all family Child ID Records/ID	Baptismal Certificate					
	Birth Certificate - all family					
	Child ID Records/ID					
Citizenship Papers						

Name/For	Trust Type*	Date Signed	Location Original? Copies?	
Trustee Name	Relationship	Contact #	Email	Address
Alt Trustee Name	Relationship	Contact #	Email	Address

Personal Information	For:	Contact #'s/ Email	Address	Document location
Address/Phone/Contacts list				
Adoption records				
Baptismal Certificate				
Birth Certificate - all family				
Child ID Records/ID				
Citizenship Papers				

Owner(s)	Institution/ Contact #	Account Type*	Account #	Online Bill Pay Y/N?
Beneficiary/ TOD?	Website, User Name, P/W	Checkbook/ Statements	Debit Card Pin	Safe Deposit Key Y/N?

Owner(s)	Institution/ Contact #	Account Type*	Account #	Online Bill Pay Y/N?
	Website, User	Checkbook/		Safe Deposit
Beneficiary/ TOD?	Name, P/W	Statements	Debit Card Pin	Key Y/N?

Construction         Contract #         Account #         Pair #           Devner(s)         Institution/         Account #         Pair #           Devner(s)         Onner(s)         Onner(s)         Debit Card Pin         Key Y           Multi-Party / Joint Bank Accounts         Institution/         Account #         Pair Y           Downer(s)         Onner(s)         Onner(s)         Debit Card Pin         Key Y           Multi-Party / Joint Bank Accounts         Onner(s)         Onner(s)         Debit Card Pin         Key Y           * Checking / Savings / Money Market / CD         Statements         Debit Card Pin         Key Y           * Checking / Savings / Money Market / CD         Institution/         Account Type*         Account #         Pair Y           Beneficiary TOD?         Website, User         Checkbook/         Debit Card Pin         Key Y           * Checking / Savings / Money Market / CD         User Market / CD         Debit Card Pin         Key Y           Beneficiary TOD?         Name, PiW         Statements         Debit Card Pin         Key Y           Beneficiary TOD?         Name, PiW         Statements         Debit Card Pin         Key Y           Beneficiary TOD?         Name, PiW         Statements         Debit Card Pin         Key Y
Beneficiary/ TOD?         Website, User Name, P/W         Checkbook/ Statements         Debit Card Pin         Safe De Key Y           Multi-Party / Joint Bank Accounts         Institution/ Contact #         Account Type*         Account #         Online Pay Y           Multi-Party / Joint Bank Accounts         Institution/ Contact #         Account Type*         Account #         Online Pay Y           Beneficiary/ TOD?         Website, User Name, P/W         Checkbook/ Statements         Debit Card Pin         Safe De Key Y           * Checking / Savings / Money Market / CD         Institution/ Contact #         Account Type*         Account #         Online Pay Y           * Checking / Savings / Money Market / CD         Institution/ Contact #         Account Type*         Account #         Online Pay Y           Owner(s)         Institution/ Contact #         Account Type*         Account #         Online Pay Y           Beneficiary/ TOD?         Website, User Name, P/W         Checkbook/ Statements         Debit Card Pin         Safe De Key Y
Multi-Party / Joint Bank Accounts       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y         * Checking / Savings / Money Market / CD       *       Credit Union Accounts       Online Pay Y         Owner(s)       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y
Multi-Party / Joint Bank Accounts         Owner(s)       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y         * Checking / Savings / Money Market / CD       Institution/ Contact #       Account Type*       Account #       Online Rep Y         Owner(s)       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Account Type*       Account #       Pay Y         Multi-Party / TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y
Owner(s)       Institution/ Contact #       Account Type*       Account #       Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y         * Checking / Savings / Money Market / CD       Institution/ Contact #       Account Type*       Account #       Online Pay Y         Owner(s)       Institution/ Contact #       Account Type*       Account #       Online Pay Y         Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y
Beneficiary/ TOD?       Website, User Name, P/W       Checkbook/ Statements       Debit Card Pin       Safe De Key Y         * Checking / Savings / Money Market / CD
Checking / Savings / Money Market / CD Credit Union Accounts           Owner(s)         Institution/ Contact #         Account Type*         Account #         Online Pay Y           Beneficiary/ TOD?         Website, User Name, P/W         Checkbook/ Statements         Debit Card Pin         Safe De Key Y
Beneficiary/ TOD? Name, P/W Statements Debit Card Pin Key Y
Business Bank Accounts
Owner(s)     Institution/ Contact #     Account Type*     Account #     Online Pay Y
Website, User         Checkbook/         Safe De           Beneficiary/ TOD?         Name, P/W         Statements         Debit Card Pin         Key Y

Owner(s)	Institution/ Contact #	Account Type*	Account #	Online Bill Pay Y/N?
	Website, User	Checkbook/		Safe Deposit
Beneficiary/ TOD?	Name, P/W	Statements	Debit Card Pin	Key Y/N?

Owned Property Address	Ownership	Ownership Type (1)	% Ownership	Type of Asset (2)
	Purchase date	Mortgage Contact?	Price/Cost	
	Document Type (3)	Document Location	As of Date	Renters/ Occupants
Owned Property Address	Ownership	Ownership Type (1)	% Ownership	Type of Asset (2)
	Purchase date	Mortgage Contact?	Price/Cost	
	Document Type (3)	Document Location	As of Date	Renters/ Occupants
Vehicles Year / Make & Model	VIN	Owner(s)	Date of Purchase	Title/Doc location?
	VIN Extra Keys?	Owner(s) TOD Beneficiary		Title/Doc location?
Year / Make & Model			Purchase	
Year / Make & Model Other Personal Property	Extra Keys?	TOD Beneficiary	Purchase	Lease Terms

Year / Make & Model	VIN	Owner(s)	Date of Purchase	Title/Doc location?
	Extra Keys?	TOD Beneficiary	Lease Contact #	Lease Terms

Property Type*	Manufacturer/ Model	Date of Purchase	Original Cost	Amount Owed?
	Owner(s)	Insured?/ Policy?	Photo?	Extra Keys?

Name of Business		Name Posi	tion/ Title	Type/	Structure (LP, LC, Corp)	Ownership %
Address	Pa	ertner/ Conta Ema	ct Name/#/ il	Bus	siness Email	Website User, P/W
USINESS INFORMATION / OV usiness Agreements Name of Business Address Address Usiness Ownership Document Business certificates of incorp Business property Asset Inventory Bookkeeping Records Bookkeeping Records USINESS Disposition upon De Business (as whole) Business Interest USINESS - Key Employees Name Name	nts poration		Loca	ion		Keys/Code
usiness Disposition upon De	ath	Linuidata			Contr	
Business (as whole)	Continue	Liquidate	Sell	ransier	Conta	act Name/#/Email
Business Interest	N/A					
usiness - Key Employees						
Name	Positio	on/Title	Locatio Docum	n of ents	Email	Address

or: Client Name		Estat	'e Care Organizer			Date, Ye
		Institution/ Organizatior	<u>ו</u>	Document		
Туре	Policy Owner	Policy #/ Group #	Contact/ Agent Name/#	Location	Beneficiaries?	Website User, P/W
Pr <u>operty</u>						<u> </u>
Homeowners						
Rental						
Other Property	Self Spouse Care					
Lif <u>e/Disability/Death</u>						
Life						
	Self					
	Spouse					
Accidental Death						
Disability						
Medical/Long Term C	Jare			1		
Ĭ						
					1	
				+	+	
				1	1	
				+	+	
				+	++	
Vehicle/Auto				+	+	
Vehicle 1				+	+	
Vehicle 2				+	+	
Rusiness Insurance				+	++	
				+	+	
				+	+	
				+	+ +	
Other						
						1

Location of spare key(s)		
Security Alarm Code	Company	
P.O. Box Location	PO Box #	

Type/Name	Owner/ Primary User	Equipment Location	Admin/ User Name/ PW	Security Questions	Method of Payment?

CESS / DIGITAL INFORMATION	M/					
CESS / DIGITAL INFORMATION	N/					
Household			I			
Location of spare key(s)						
Security Alarm Code		Company				
P.O. Box Location		PO Box #				
Computer/Network						
						Method of
	Type/Name	Owner/ Primary User	Equipment Location	Admin/ User Name/ PW	Security Questions	Payment?
Cell Phone/Tablets/Devices						Method of
Cell Phone/Tablets/Devices	Type/Name &					Payment?
Cell Phone/Tablets/Devices Device	Type/Name & Carrier	Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	
		Owner/ primary user	Equipment Location	Admin/ User Name/ PW	Security Questions	

		FOD
Allergies / Adverse Reactions	FOR:	FOR:
Births		
Birthmarks/scars/other (tattoos)		
Blood Type		
Congenital / Genetic Conditions		
Diabetes?		
Diseases / Conditions		
Immunizatione?		
Injuries / Serious accidents?		
	- DETAILED FOR: 	

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