



9350 Corporate Hills Dr. #781104  
Wichita, KS 67207  
[www.theestateassistance.com](http://www.theestateassistance.com)  
[theestateassistance@gmail.com](mailto:theestateassistance@gmail.com)  
(316) 302-5531

## **In Case of Death Information – Section 1**

What is your computer login: \_\_\_\_\_

Cell Phone Number and phone passcode: \_\_\_\_\_

\_\_\_\_\_

Cell Phone Carrier, Username and Password for Account: \_\_\_\_\_

\_\_\_\_\_

Bank Names, Account Numbers, Usernames and Passwords for each: Are any accounts joint, if so who is the joint account holder? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Brokerage Firm(s) Name, Broker, Account Number, Username. Password and Named Beneficiaries:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Credit Card Account Names, Account Numbers, Usernames, Passwords: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Life Insurance Policy Account Names, Policy Numbers and Beneficiaries: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

Do you own property, have a mortgage, home equity loan or reverse mortgage? If yes, list addresses of property, names and account numbers of financial institutions holding mortgage or loans: \_\_\_\_\_

---

---

---

Do you own vehicles or boats and if so where are the titles and registration and are there any loans on the same? If yes, list vehicles, boats, where property is kept and names and account numbers of financial institutions holding loans: \_\_\_\_\_

---

---

Have you given or taken any personal loans? If so, list to or from whom and how much is owed: \_\_\_\_\_

---

---

Are any membership dues, subscriptions, donations or purchases subtracted directly from your bank account? If yes, list name of entity, account number and monthly amount of same: \_\_\_\_\_

---

---

Do you have a Will? If so where is it located and who is the attorney who assisted in the preparation of the same? \_\_\_\_\_

---

Are your assets in a Trust? If so do you have copies of the Trust paperwork and who is the attorney who assisted in the preparation of the same: \_\_\_\_\_

---

Who is named as Executor or Administrators of your Wills or Trusts and the name, address, and telephone number of the same: \_\_\_\_\_

---

Do you have a safe or safe deposit box? If so where are they located and who has the keys or combination to access the same: \_\_\_\_\_

---

Do you have prepaid funeral arrangements/cemetery plots/prepaid vaults? If so, where are they located and who is the contact at the same? \_\_\_\_\_

---

Where are copies of your last 3 years of filed tax returns? Has someone other than you prepared the same? If so list name and address of the person who prepared them: \_\_\_\_\_

---

---

Do you receive monthly income from a pension or annuity? If so list amount and name of entity you receive the same from along with account numbers: \_\_\_\_\_

---

---

Do you have any other source(s) of income? If so what are the details of the same? \_\_\_\_\_

---

---