

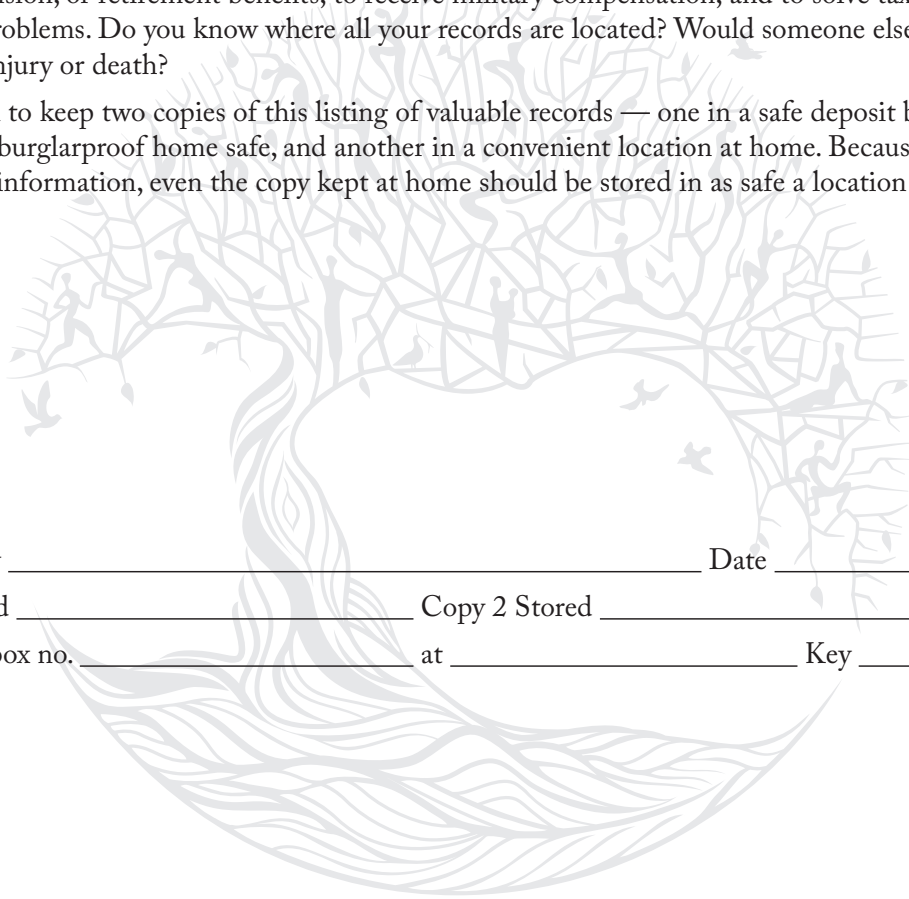
# Beginning the Estate Planning Process

## Our Valuable Records

Your family is a small business unit, and it deserves to be operated just as efficiently as any other business. You have many papers necessary for managing your personal and business affairs. Some are more important than others, but all need to be accessible when needed and stored in a safe place.

Receipts, documentation, proofs of ownership, and pieces of identification may be necessary to collect insurance, pension, or retirement benefits; to receive military compensation; and to solve tax or inheritance problems. Do you know where all your records are located? Would someone else know in case of your injury or death?

You may wish to keep two copies of this listing of valuable records — one in a safe deposit box or fireproof and burglarproof home safe, and another in a convenient location at home. Because of the nature of the information, even the copy kept at home should be stored in as safe a location as possible.



Name/Family \_\_\_\_\_ Date \_\_\_\_\_  
Copy 1 Stored \_\_\_\_\_ Copy 2 Stored \_\_\_\_\_  
Safe deposit box no. \_\_\_\_\_ at \_\_\_\_\_ Key \_\_\_\_\_

# Notes

**Personal Information**

Family member name	Birth date	Where birth certificate kept*	Social Security number	Where Social Security card kept*

\*Adults and responsible youth should not carry Social Security cards in their purses or wallets. Birth certificates and Social Security Cards should be kept in a safe deposit box or fireproof and burglarproof home safe. Medicare cards can be carried.

## Important Advisers

Type	Name	Address	Telephone
Attorney			
Executor husband's will			
Executor wife's will			
Religious adviser			
Doctor(s)			
Accountant or tax adviser			
Stockbroker or investment			
Banker or trust officers(s)			
Employer or personnel manager			
Business manager			
Life insurance agent			
Health insurance agent			
Car insurance agent			
Home insurance agent			
Other			

**Property**

Type	Owner(s)	Type of ownership	Date acquired	Location/description	Where title/ Ownership Information kept*	Additional information
<b>Real Estate</b>						
Residence(s)						
Business						
Vacation						
<b>Motor Vehicle(s)</b>						
<b>Other</b>						

\*Titles, leases, and other important ownership information should be stored in a safe deposit box or fireproof and burglarproof home safe.

**Other Assets (Equipment, land, etc.)**

Type	Owner(s)	Type of ownership	Date acquired	Location/description	Where title/ Ownership information kept*	Additional information
<b>Real Estate:</b>						
Residence(s)						
Business						
Vacation						
<b>Motor Vehicle(s)</b>						
<b>Other</b>						

\*Titles, leases, and other important ownership information should be stored in a safe deposit box or fireproof and burglarproof home safe.

***Non-Titled Property***

Item	Description	Location	Who It Goes To

\*Titles, leases, and other important ownership information should be stored in a safe deposit box or fireproof and burglarproof home safe.

## Banking, Savings, and Investments

Financial Institution/ Company	Address and telephone	Owner(s)	Where Records Kept*	Additional information (if appropriate)			
				I. D. #	Beneficiary	Price/ Value(s)	Dates (purchase, maturity, etc.)
<b>Checking</b>							
<b>Savings</b>							
<b>Certificates of Deposit</b>							
<b>Money market accounts</b>							
<b>Bonds, Treasury bills, etc.</b>							
Type	Company						
<b>Stocks, mutual funds, investment trusts, etc.</b>							
Type	Company						



Financial Institution/ Company	Address and telephone	Owner(s)	Where Records Kept*	Additional information (if appropriate)				
				I. D. #	Beneficiary	Price/ Value(s)	Dates (purchase, maturity, etc.	Other

**Individual retirement accounts, KEOGH accounts, SEPs**

Type	Company							

**Retirement plans, pensions, etc.**


**Other**

Type	Company							

\*Savings and investment certificates, bonds, bills, and other evidence of ownership (financial records that would be difficult and/or costly to replace, or that could be transferred illegally in the case of loss or theft) should be kept in a safe deposit box or fireproof and burglarproof home safe. Monthly statement and cancelled checks, which generally can be replaced, can be kept in a home business center, file drawer, desk, etc.

**Insurance (Life, Health, Homeowner's/Renter's, Auto, etc.)**

Type	Company and address	Policy #	Where Policy Kept*	Additional Information (if appropriate)					
				Primary Beneficiary	Contingent Beneficiary	Policy Owner	Person/Property Insured	Value(s)	Other

\*Since policies are replaceable, they can be stored in a home business center, file cabinet, desk, etc.

**Credit Cards\***

Type of card	In name of	Account #	If lost or stolen, notify		
			Company/institution	Address	Telephone

\*Credit cards should be carried in your purse or wallet.

## Debit Information

Type	Company/person and address	Amount	Payment Plan	Where contracts/ Records kept*	Additional Information
<b>What we owe:</b>					
<b>What others owe us:</b>					

\*Important contracts, notes, liens, and evidence of debt payments should be kept in a safe deposit box or fireproof and burglarproof home safe.

## Membership in Organizations/Clubs\*

Name of Organization	Address	Telephone	Membership information	
			In whose name	Number

\*Membership cards can be carried in your purse or wallet.

## Other Important Records

Group	Kind	Where Kept*	Additional Information
<b>A</b>	Adoption Papers		
	Baptismal records		
	Bill(s) of sale		
	Citizenship papers		
	Death certificate(s)		
	Diploma(s)		
	Divorce papers		
	Easements/rights of way		
	Household inventory		
	Irreplaceable receipts/Proof(s) of tax deductions		
	Marriage record(s)		
	Military records		
	Passport papers		
	Power of attorney		
Will(s)			
<b>B</b>	Education records		
	Employment records		
	Family history		
	Funeral/burial records		
	Household inventory (copy)		
	Income/expense records		
	Income tax returns/replaceable proofs of deductions		
	Medical records		
	Network statements		
	Safe deposit box inventory		
	Warranties/appliance manuals		
	Will(s)		

Group	Kind	Where Kept*	Additional Information
<b>C</b>	Employee ID card(s)		
	Identification card/whom to notify in emergency		
	Insurance/medical cards		
<b>Other</b>			

\*Guideline: The more important the record, and the more expensive and difficult it is to replace, the safer the storage location should be. For some records (will, family history, tax returns, household inventory) you may wish to keep copies in more than one location. Group A items should be kept in a safe deposit box or fireproof and burglarproof home safe. Group B items can generally be stored in a home business center, file cabinet, desk, et. Group C items should be carried in your purse or wallet.

### **Digital Information**

So much of what we do today is online. Providing access to your digital accounts can help save your family or executor time and hassle.  
Be sure to update this section frequently, especially the passwords.

### **Security Codes**

Type	Security code/Password
Personal computer	
Laptop	
Tablet	
Cell phone	
Voice	
House alarm	

**Digital Accounts**

Account Type	Email/Username	Password	How account should be handled (e.g., closed, "friends/followers: notified)
<b>Personal/business email accounts</b>			
<b>Personal/business social media accounts</b>			
<i>Facebook</i>	<i>WillieWildcat</i>	<i>Willie12345</i>	

**Online Accounts**

*Examples include Wal-Mart, Swan's, Health Savings Accounts, etc.*

Account/Site	Username	Password	How Account Should be Handled

Account/Site	Username	Password	How Account Should be Handled

## ***Other Documents to Consider***

**Funeral arrangements:** Many funeral homes have a booklet in which to fill out your wishes.

**Pets:** What do you want done with them?

**Livestock:** What do you have, where are they at, what should be done?

**Letter of Last Instruction:** See Estate Planning Terms.

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