

ESTATE INSTRUCTIONS

NAME: _____
DATE OF BIRTH: _____ SOCIAL SECURITY NO: _____
ADDRESS: _____

To Client: Please complete these Estate Instructions. It is suggested you keep them with your original Last Will and Testament. This will aid your Personal Representative in the administration of your estate. You may also wish to provide a copy to your Personal Representative and to us.

I. ADVISORS

My Attorney is: LIBBY ELLETT TOMAR
438-A Uluniu Street
Kailua, Hawaii 96734
Telephone No. 262-2800
E-Mail: libbylaw@clearwire.net

My Accountant/Tax Preparer is:

Address: _____

Phone Number: _____

My Insurance Agent is:

Address: _____

Phone Number: _____

My Financial Advisor is:

Address: _____

Phone Number: _____

My Bank and Branch is:

Address:

My annuities/IRA's are:

My pension is with:

Address:

My credit union is:

Address:

Account No.

Other Financial Institutions are:

Mortgage Loan Number and Company:

_____ _____
_____ _____
_____ _____

II. RECORDS

Item

Location

Medical Directive and/or

Living Will:

Original Will:

Original Power of Attorney: _____

Original Trust Agreement: _____

Birth Certificate: _____

Insurance Policies:
(home/car/life/health): _____

Securities (Stocks, Bonds, Mutual funds, CD's) _____

Real Property Deeds or Leases & Mortgages: _____

Safety Deposit Box:
_____ Bank: _____
Branch: _____
Key is located: _____

Promissory Notes and Receivables: _____

Checkbook: Bank: _____
Branch: _____
Account No.: _____

Savings Deposits: Credit Union/Bank: _____
Branch: _____
Account No.: _____

Income Tax Records: _____

Social Security Information located: _____

Regular Bills:
(Automatic bill payments are noted
with an asterisk)

(see over for more)

Pin or Password Numbers for Access
to ATM or various websites are stored here:

Other Documents:

III. FAMILY

Names and Addresses of Relatives to contact upon my illness:

Names and Addresses of Relatives/Friends to contact upon my death:

Names and Addresses of Beneficiaries:

Funeral and Burial or Cremation Instructions:

Instructions Regarding my Pet(s):

Words of Advice to my Family Members/Beneficiaries:
