

This form should be stored in a secure location with your other estate planning documents, as it contains sensitive information that could be harmful if stolen. If additional pages are used, all should be bound together.

Your executor should be aware of the existence and location of all estate planning documents.

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One of the most expensive and time consuming portions of an uncontested succession is the gathering of information regarding all of the decedent's assets. It will be of enormous help to your survivors to keep a list of all accounts and notable assets in one place.

Should you become incapacitated for any reason, this list will be an invaluable aid to your family in identifying and maintaining your assets.

**This material has been prepared for general information purposes only. The information herein is not intended to be, nor may it be considered as, legal advice. Possession or distribution of this material in no way establishes an attorney-client relationship.**

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## Account Listing of

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Placer Law Firm, L.L.C.

**Bank and Investment Accounts:**

Name(s) on account: \_\_\_\_\_  
\_\_\_\_\_

Account Number: \_\_\_\_\_

Account type: \_\_\_\_\_

Institution: \_\_\_\_\_

Contact name : \_\_\_\_\_

Contact number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_  
\_\_\_\_\_

Account Number: \_\_\_\_\_

Account type: \_\_\_\_\_

Institution: \_\_\_\_\_

Contact name : \_\_\_\_\_

Contact number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_  
\_\_\_\_\_

Account Number: \_\_\_\_\_

Account type: \_\_\_\_\_

Institution: \_\_\_\_\_

Contact name : \_\_\_\_\_

Contact number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_  
\_\_\_\_\_

Account Number: \_\_\_\_\_

Account type: \_\_\_\_\_

Institution: \_\_\_\_\_

Contact name : \_\_\_\_\_

Contact number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_  
\_\_\_\_\_

Account Number: \_\_\_\_\_

Account type: \_\_\_\_\_

Institution: \_\_\_\_\_

Contact name : \_\_\_\_\_

Contact number: \_\_\_\_\_

**Retirement Accounts, Annuities and Life Insurance:**

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

Company: \_\_\_\_\_

Web URL: \_\_\_\_\_

Login name: \_\_\_\_\_

Password: \_\_\_\_\_

**Other notable assets:**

Description: \_\_\_\_\_

Location: \_\_\_\_\_

Description: \_\_\_\_\_

Location: \_\_\_\_\_

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Location: \_\_\_\_\_

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