

Personal Estate Inventory

A personal record of assets and obligations for:



Compliments of:



Dan Scharlach

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Stratos Wealth Partners, a registered investment advisor. Stratos Wealth Partners and Innovative Wealth Partners are separate entities from LPL Financial.

Explanation and overview of the Personal Estate Inventory

By maintaining a comprehensive record of your personal affairs, you can keep important information available for easy access in times of emergency; it is important that you, and your family, be able to take immediate action with regard to financial/emergency type affairs.

Also, an inventory is invaluable when death or an incident occurs.

This booklet can be as comprehensive as you deem necessary. Advise family members of this record, and where it is kept. Once a year it is a good idea to update or at least review.

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Provided to you by your trusted Financial Advisor, Dan Scharlach

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Personal information:

Full legal name	
Birthdate/birthplace	
Your address	
Health insurance plan provider	
Phone number	
Employer company name	
Address (business)	
Phone (home)	
Phone (cell)	
Key contact person at work	
Title	
Spouse/partner full name	
Birthdate/birthplace	
Employer company name	
Address (business)	
Key contact person at work	
Title	

Child's Name	
Birthdate/gender	
Address if not at home	

Child's Name	
Birthdate/gender	
Address if not home	

Child's Name	
Birthdate/gender	
Address if not home	

Child's Name	
Birthdate/gender	
Address if not home	

Executor	
Best phone and email	

Child guardian	
Best phone and email	
Secondary child guardian	
Best phone and email	

Important contacts (family):

Family member name and relationship
Best phone and email

Family member name and relationship
Best phone and email

Family member name and relationship
Best phone and email

Family member name and relationship
Best phone and email

Family member name and relationship
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Family member name and relationship
Best phone and email

Contacts continued (work):

Work associate name and relationship
Best phone and email

Work associate name and relationship
Best phone and email

Work associate name and relationship
Best phone and email

Work associate name and relationship
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Work associate name and relationship
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Best phone and email

Work associate name and relationship
Best phone and email

Work associate name and relationship
Best phone and email

Contacts continued (friends):

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Friend's name
Best phone and email

Contacts continued (professional relationships):

Trusted financial advisor
Best phone and email

Dan Scharlach
260.243.5101 and dscharlach@stratoswp.com

Primary attorney
Best phone and email

Primary life insurance agent
Best phone and email

Stock broker/misc.
Best phone and email

Business insurance agent
Best phone and email

Banker
Best phone and email

Doctor
Best phone and email

Dentist
Best phone and email

Realtor
Best phone and email

Disability insurance agent
Best phone and email

Other attorney
Best phone and email

Property and vehicle insurance agent
Best phone and email

CPA/tax advisor
Best phone and email

Funeral arrangements
Best phone and email

Important bills

Rent/mortgage

Frequency and due date

Electric company

Frequency and due date

Gas company

Frequency and due date

Water company

Frequency and due date

Insurance company

Frequency and due date

Loan 1

Frequency and due date

Loan 2

Frequency and due date

Loan 3

Frequency and due date

Credit card 1

Frequency and due date

Credit card 2

Frequency and due date

Credit card 3

Frequency and due date

Miscellaneous

Frequency and due date

Miscellaneous

Frequency and due date

Miscellaneous

Frequency and due date

Health concerns/issues (applicable to ANY member living with you):

You
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Spouse/partner
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Child
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Child
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Child
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Other
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Other
Allergies
Dietary restrictions
Medical/surgery treatments
Medications

Emergency plan/instruction

Meeting location 1
Plan

Meeting location 2
Plan

Water shutdown location
Plan

Gas shutdown location
Plan

Fire extinguisher locations
Plan

Emergency contact
Best phone and email

Emergency contact
Best phone and email

Emergency contact
Best phone and email

Emergency contact
Best phone and email

Emergency contact
Best phone and email

Emergency contact
Best phone and email

Emergency contact
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Emergency contact
Best phone and email

Emergency contact
Best phone and email

Location of back up file/docs/policies/assets

Social security cards

Location

Passports

Location

Birth certificates

Location

Will's

Location

Medical directives

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Insurance contracts

Life insurance 1
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Life insurance 2
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Life insurance 3
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Life insurance 4
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Disability insurance
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Primary health insurance
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Bank accounts/credit cards

Bank 1

Name

Type

Description

Owners

Institution contact info

Address

Location of checks/checkbooks

Bank 2

Name

Type

Description

Owners

Institution contact info

Address

Location of checks/checkbooks

Credit card 1

Type

Bank

Name on card

Customer service #

Credit limit

Credit card 2

Type

Bank

Name on card

Customer service #

Credit limit

Credit Card 3

Type

Bank

Name on card

Customer service #

Credit limit

Vehicle/miscellaneous

Property insurance
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Vehicle insurance
Owner/insured
Policy number
Policy amount
Beneficiaries
Agent phone and email

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Property insurance
Owner/insured

Investment accounts

Investment account 1

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 2

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 3

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 4

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 5

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 6

Type of account

Name of institution

Contact phone and email

Location of information

Investment account 7

Type of account

Name of institution

Contact phone and email

Location of information

Other assets (Jewelry, Art, Collectibles, Furnishings, Electronics, etc.)

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

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Item location

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Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Safety deposit box/miscellaneous

Description

Location & phone number

Description

Location & phone number

Description

Location & phone number

Description

Location & phone number

Description

Location & phone number

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Location & phone number

Description

Location & phone number

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