

ESTATE PLAN COVERSHEET OF _____

My estate plan is comprised of the following documents:

Document:

Execution Date:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Key people in my estate plan:

_____ is Guardian of my Children	Phone: _____
_____ is Caregiver of my Pets	Phone: _____
_____ has Power of Attorney	Phone: _____
_____ is my Agent for Health Care	Phone: _____
_____ is Executor of my Will	Phone: _____
_____ is Alternate Executor of my Will	Phone: _____
_____ is Trustee of my Trust	Phone: _____
_____ is Successor Trustee of my Trust	Phone: _____
_____ will oversee Final Arrangements	Phone: _____

___ I have ___ do not have a Safe Deposit Box at _____ (Bank). My important files and financial records are located: _____.