**Family Estate Worksheet**

**Personal Information:**

| **Name** | **Email Accounts** | **User ID** | **Passwords** |
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**Important Documents:**

| **Important Documents** | **Type of Document** | **Location** |
| --- | --- | --- |
| **Deeds** |  |  |
| **Will** |  |  |
| **Trust** |  |  |
| **Titles** |  |  |
| **Birth Certificate** |  |  |
| **Heirlooms** |  |  |
|  |  |  |

| **Children/ Name** | **Email** | **Phone** | **Address** |
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**Bank Accounts:**

| **Bank Accounts** | **Company** | **User ID** | **Passwords** | **Balance** |
| --- | --- | --- | --- | --- |
| **Savings** |  |  |  |  |
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|  |  |  |  |  |
| **Checking** |  |  |  |  |
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| **Business** |  |  |  |  |
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| **Mutual Funds** |  |  |  |  |
|  |  |  |  |  |
| **Safety Deposit Box**  **Cash on Hand** |  |  |  |  |

**Insurance:**

| **Insurance** | **Company** | **User ID** | **Passwords** | **Cost** |
| --- | --- | --- | --- | --- |
| **Medical Insurance** |  |  |  |  |
| **Car Insurance** |  |  |  |  |
| **Life Insurance** |  |  |  |  |
| **House Insurance** |  |  |  |  |
| **Dental Insurance** |  |  |  |  |
| **Vision Insurance** |  |  |  |  |
|  |  |  |  |  |

**Investments:**

| **Investments** | **Company** | **User ID** | **Password** | **Balance** |
| --- | --- | --- | --- | --- |
| **Stocks** |  |  |  |  |
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| **Retirement Accounts** |  |  |  |  |
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| **Cryptocurrency** |  |  |  |  |
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| **Properties** | **Location** | **Title** | **Payments** | **Fees** |
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**Credit Cards:**

| **Credit Cards** | **Company** | **User ID** | **Password** | **Balance** |
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**Utilities:**

| **Utility Bills** | **Company** | **User ID** | **Passwords** | **Cost** |
| --- | --- | --- | --- | --- |
| **City** |  |  |  |  |
| **Power** |  |  |  |  |
| **Gas** |  |  |  |  |
| **Phone** |  |  |  |  |
| **Internet** |  |  |  |  |
|  |  |  |  |  |

**Bills:**

| **Bills** | **Company** | **User ID** | **Passwords** | **Cost** |
| --- | --- | --- | --- | --- |
| **Medical** |  |  |  |  |
| **Car Payments** |  |  |  |  |
| **House Mortgage (Escrow)** |  |  |  |  |
| **Vehicles** |  |  |  |  |
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**Business/Taxes**

| **Business/Taxes** | **Company** | **User ID** | **Password** |
| --- | --- | --- | --- |
| **Estate Planner** |  |  |  |
| **Accountant**  **Tax Preparer** |  |  |  |
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**Internet Accounts:**

| **Internet Accounts** |  | **User ID** | **Passwords** | **Fees or Cost** |
| --- | --- | --- | --- | --- |
| **Church of Jesus Christ of Latter-day Saints** |  |  |  |  |
| **Family Search** |  |  |  |  |
| **Amazon** |  |  |  |  |
| **Costco** |  |  |  |  |
| **Pay Pal** |  |  |  |  |
| **Facebook** |  |  |  |  |
| **Google** |  |  |  |  |
| **Instagram** |  |  |  |  |
| **Esty** |  |  |  |  |
| **Walmart** |  |  |  |  |
| **Smith’s** |  |  |  |  |
| **Disney +** |  |  |  |  |
| **Espn** |  |  |  |  |
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**Internet Home Devices:**

| **Internet Home Devices** | **Location** | **User ID** | **Password** |
| --- | --- | --- | --- |
| **T.V** |  |  |  |
| **Roku** |  |  |  |
| **DS Video** |  |  |  |
| **Computer** |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Tablets** |  |  |  |
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|  |  |  |  |
| **Sprinkler System** |  |  |  |
| **Lights** |  |  |  |
| **Thermostat** |  |  |  |
| **Internet** |  |  |  |
| **Phone** |  |  |  |
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