

Osprey Money Management, LLC

ESTATE PLANNING ORGANIZER

Personal Profile

Family Members

Name

Social Security Number

Birth date

Husband _____

Wife _____

Children _____

Other relatives _____

Attorney

Address _____

Phone _____

Accountant

Address _____

Phone _____

Investment Broker

Address _____

Phone _____

Location of will _____

Personal representative/executive _____

Location of tax returns _____

Location of safe deposit box (institution) _____

Address _____

Location of Keys _____

Names of those authorized to open _____

Contents (including stock certificates, EE bonds, bearer bonds, etc.)

Location of appraisal and inventory of personal property (including collectibles)

Funeral and burial arrangements

Raising Investor Awareness

PHONE 321-383-4005 TOLL FREE 877-650-3796 FAX 321-383-4073 www.OspreyWealthCoaching.com

918 S. Washington Ave., Titusville, FL 32780

Osprey Money Management, LLC

Bank Accounts

Bank _____

Address _____

How account is registered _____

Account number _____ Type of Account _____

Bank _____

Address _____

How account is registered _____

Account number _____ Type of Account _____

Bank _____

Address _____

How account is registered _____

Account number _____ Type of Account _____

Trust Accounts

Institution _____

Address _____

Type of trust _____

Current trustee _____

Successor trustee _____

Beneficiaries _____

Institution _____

Address _____

Type of trust _____

Current trustee _____

Successor trustee _____

Beneficiaries _____

Osprey Money Management, LLC

Accounts for which family members are trustees or guardians

Securities

Brokerage firm _____

Address _____

How account is registered _____

Account Number _____

Brokerage firm _____

Address _____

How account is registered _____

Account Number _____

Brokerage firm _____

Address _____

How account is registered _____

Account Number _____

IRAs/Retirement Plans

Type: IRA Qualified Plan 403B

Participant _____

Name of company (i.e., brokerage firm, bank, mutual fund) _____

Address _____

Account Number _____ Approximate value _____ Date _____

Beneficiaries _____

Type: IRA Qualified Plan 403B

Participant _____

Name of company (i.e., brokerage firm, bank, mutual fund) _____

Address _____

Account Number _____ Approximate value \$ _____ Date _____

Beneficiaries _____

Type: IRA Qualified Plan 403B

Raising Investor Awareness

Osprey Money Management, LLC

Participant _____

Name of company (i.e., brokerage firm, bank, mutual fund) _____

Address _____

Account Number _____ Approximate value _____ Date _____

Beneficiaries: _____

Life Insurance Policies

Owned by	Type of Policy*	Issuer	Insured Beneficiary	Death Benefit	Annual Premium	Cash Value	Loans
_____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____

* WL= whole life; G= group term; UL = universal life; SPWL = single premium whole life; T = term; SL = survivorship life

↑The owner is assumed to be the insured unless you note otherwise.

Annuities

Owned by	Type of Policy*	Issuer	Beneficiary	Death Benefit	Cash Value
_____	_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____

*F = fixed rate; V = variable

Real Estate

Real estate/real estate interests owned _____

Location of property _____

Lender _____

Lender's address _____

Account Number _____

Amount of loan \$ _____ Date _____

Payment \$ _____ Date due _____

Raising Investor Awareness

Osprey Money Management, LLC

Interest Rate _____ Maturity _____

Real estate/real estate interests owned _____

Location of property _____

Lender _____

Lender's address _____

Account Number _____

Amount of loan \$ _____ Date _____

Payment \$ _____ Date due _____

Interest Rate _____ Maturity _____

