

# Estate Contact Information

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## Quick Contacts

Provide a copy of this section along with your power of attorney documents and living will to your agents, attorney-in-facts, successor trustees and others who may need this contact information readily available. As contact information changes, provide updates to those you have previously received this information.

To quickly update others: highlight this section, copy and paste into an email and send to the recipient, who then has both an electronic and physical copy.

If those named as agents, attorney-in-facts, executors, personal representatives and successor trustees are listed as "Co-" rather than linear (1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>), change the designation. If needed, add a 4<sup>th</sup> person.

Place a copy of these documents with your estate planning documents.

Your name:

Phone:

Address:

# Estate Contact Information

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## Financial Power of Attorney Agents / Attorney-in-Facts

1<sup>st</sup>:

Phone:

Email:

Relation:

Address:

2<sup>nd</sup>:

Phone:

Email:

Relation:

Address:

3<sup>rd</sup>:

Phone:

Email:

Relation:

Address:

# Estate Contact Information

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## Executors / Personal Representatives / Successor Trustees:

1<sup>st</sup>:

Phone:

Email:

Relation:

Address:

2<sup>nd</sup>:

Phone:

Email:

Relation:

Address:

3<sup>rd</sup>:

Phone:

Email:

Relation:

Address:

Location of last will & testament and/or living trust (if applicable):

# Estate Contact Information

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## Medical Power of Attorney Agents:

1<sup>st</sup>:

Phone:

Email:

Relation:

Address:

2<sup>nd</sup>:

Phone:

Email:

Relation:

Address:

3<sup>rd</sup>:

Phone:

Email:

Relation:

Address:

Primary physician name:

Address and phone:

# Estate Contact Information

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## Emergency Contacts

Name 1<sup>st</sup>:

Phone:

Email:

Address:

Relationship:

Name 2<sup>nd</sup>:

Phone:

Email:

Address:

Relationship:

Name 3<sup>rd</sup>:

Phone:

Email:

Address:

Relationship:

# Estate Contact Information

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## Family Contacts

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Estate Contact Information

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## Friends to Contact

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Estate Contact Information

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## Employment Contacts

Name:

Company:

Phone:

Email:

Address:

Relationship:

Name:

Company:

Phone:

Email:

Address:

Relationship:

Name:

Company:

Phone:

Email:

Address:

Relationship:



# Estate Contact Information

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## Beneficiary Contact Information

If listing a charity, include a website address.

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Estate Contact Information

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## Additional Contacts

Property and Casualty Insurance Agent

Name:

Company:

Phone:

Email:

Address:

Life Insurance Agent

Name:

Company:

Phone:

Email:

Address:

Financial Advisor 1

Name:

Company:

Phone:

Email:

Address:

# Estate Contact Information

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## *Estate Planner*

Name:

Company:

Phone:

Email:

Address:

## Accountant

Name:

Company:

Phone:

Email:

Address:

## Lender

Name:

Company:

Phone:

Email:

Address:

# Estate Contact Information

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## *Realtor*

Name:

Company:

Phone:

Email:

Address:

## *Electricity*

Name:

Company:

Phone:

Email:

Address:

## *Phone / Cell Phone Provider*

Name:

Company:

Phone:

Email:

Address:

# Estate Contact Information

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*Cable / Internet Provider*

Name:

Company:

Phone:

Email:

Address:

# Estate Contact Information

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## Businesses Owned

Talk to an attorney or accountant regarding your business succession plans. Whatever your succession plan does not cover, list the information here.

**Name:**

**Type:**

**Buy/Sell in place?**

**Partners:**

**Important contacts:**

**List of assets:**

**Bank accounts:**

**Instructions:**

**Name:**

**Type:**

**Buy/Sell in place?**

**Partners:**

**Important contacts:**

**List of assets:**

**Bank accounts:**

**Instructions:**