

TITLE TRANSFERS

REAL PROPERTY
(Correction Deed, Grant, Warranty, or Quitclaim Deed)

PROPERTY

ADDRESS

Principal Place of Residence

Second Home

Condominium

Real Estate

MORTGAGES OWED TO YOU

LOAN OWED TO YOU
(Assign to Living Trust by notaries assignment)

CHECKING ACCOUNTS

(Trust will be as owner.. Only trustees authorized to Sign)

BANK NAME & ADDRESS CURRENT NAME OF ACCOUNT ACCT #

SAVINGS ACCOUNTS

BANK NAME & ADDRESS CURRENT NAME OF ACCOUNT ACCT#

CERTIFICATES OF DEPOSIT

BANK NAME & ADDRESS NAME ACCOUNT IS CURRENTLY UNDER ACCT#

STOCKS/BONDS/MUTUAL FUNDS/U.S. SAVINGS BONDS

(Non tax deferred)

INVESTMENT TYPE

FINANCIAL INSTITUTION

ACCT #

EMPLOYER PROVIDED BENEFITS

(Deferred Comp. 401K Etc.)

TYPE OF BENEFIT

ACCOUNT OR POLICY #

BENEFICIARIES

TYPE OF BENEFIT	ACCOUNT OR POLICY #	BENEFICIARIES	
		1 st	2 nd
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DEFERRED SAVINGS

(IRA's, Etc.)

INSTITUTIONS NAME & ADDRESS/ACCOUNT #

BENEFICIARIES

INSTITUTIONS NAME & ADDRESS/ACCOUNT #	BENEFICIARIES	
	1 st	2 nd
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LIFE INSURANCE POLICIES

INSTITUTION NAME & ADDRESS/INSURED/POLICY #	BENEFICIARIES
<hr/>	1 st 2 nd

OTHER INSURANCE POLICIES

(Long & Short Term Care, Critical Illness/Cancer, Medicaid Planning, Disability, Life/Income Replacement, Individual Health Care)

INSTITUTION NAME & ADDRESS	INSURANCE TYPE
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AUTOMOBILES

CAR MODEL AND YEAR
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RECREATIONAL VEHICLES
(Motorcycles, Boats, RV's, Etc.)

VEHICLE MODEL AND YEAR

STATE LICENSED

BUSINESS OWNER
(Licenses & D.B.A. Corporations and/or LLC's)

SOCIAL MEDIA
(Logins and Passwords)

FACEBOOK / LINKEDIN / TWITTER / FLICKR / OTHER
