

## **Personal Inventory**

The following is for your personal use. It is designed for you to give to the executor of your estate and, perhaps, a family member.

### **Location of Important Documents**

Location of original Last Will and Testament:

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Name and address of Executor:

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Name and address of Personal Attorney:

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Location of Citizenship papers, if naturalized:

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Location of Income Tax Records:

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Location of Military Service Number and Discharge papers:

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### **Personal Assets**

Unless obviously personal (your toothbrush), property in a rectory is considered as belonging to the parish unless an inventory of personal belongings is filed. Please attach your inventory:

Location of automobile title and insurance:

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Description of real estate owned and location of deed(s):

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Location of Mass obligations and stipends:

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## **Personal Financial Accounts**

In the following categories, indicate ownership, account numbers and supporting documentation (pass book, certificates, etc.) so assets may be readily gathered.

Bank(s) Name and Location:

Safety Deposit Box:

Checking Account:

Savings Account:

Certificate(s) of Deposit:

Credit Card(s) (include name of bank, account number and address):

Stocks and Bonds, and broker or firm you work with:

Life, Accident or Health Insurance Policies:

Long-term Care Policies:

Retirement or Pension Plan benefits payable to your estate or to another:

Other assets not indicated above (artworks, collections, royalties, etc.):

Long-term Obligations:

- Pledges for contributions to fund-raising campaigns
- Loan(s)
- Mortgage(s)