

All the Info You Need



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LAST NAME Holdings

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Trusted Advisors

Name _____

Company

Phone Number

Attorney

CPA/Tax Advisor

Financial Advisor

Pastor/Priest

Funeral Home

Family to call:

Friends to call:

Neighbors to call:

Digital Pages

password

Instructions

Any particular information of preferences for services

I want you to:

Please sing these songs:

Favorite Bible Passages, Poems, or Sayings You would like communicated:

I'd just as soon these people were not there:

Love Notes:

Remembrances, favorite shared stories, things you want family and friends to know:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

LAST NAME Holdings

DESCRIPTION	WHOSE	IDENTIFYING #	VALUE AS OF 7/23/2020	CONTACT	PHONE NUMBER	NOTES
Whole Life/Term Insurance	HERS	1701234	\$ 159,138.50	Customer Service Life	877-123-0000	
Whole Life/Term Insurance	HIS	1691234	\$ 211,000.00	Customer Service Life	877-123-0000	GLWB \$3,161.84 off \$70,263.18 9/10/2023
Annuity	HIS	E1881234	\$ 79,764.64	CO Annuity	800-123-0000	GLWB \$1886.89 of \$41,930.28 9/9/23 10 yr
Annuity	HERS	E1881235	\$ 30,322.13	CO Annuity	800-123-0000	
BANK/CREDIT UNION						
Mortgage or Home Savings	Joint	999123	\$ 18,900.00	BANK/CU	800-999-8888	no mortgage, pd biweekly from acct
CDS			\$ 62,532.17			1 - 4/26/2020; 2 - 5/21/2021
Visa	Joint	BANK	\$ (2,517.93)			due 21st of month
Paul's Visa		CitiBank	\$ (45.00)			
Emergency Savings			\$ 4,925.31			
CD			\$ 2,044.01			7/8/2021
Discover Card			\$ (500.00)			
INVESTMENTS						
E*Trade	Joint	492000	\$ 40,652.88	Financial Advisor	717-444-3333	Sally Smartone
HIS 401K/IRA			\$ 250,301.24	Fidelity	800-123-7777	
Company Stock	# shares	425	\$ 58,506.84	Company	717-555-6666	
HER 401K/IRA	2015	600	\$ 6,690.59	Company	717-555-6666	
Performance Stock	2000	36	\$ -	Company	717-555-6666	
Home Value			\$ 260,000.00			
TOTAL HOLDINGS			\$ 1,201,299.38			