Wyman

Estate Reference Guide

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Important People

Name	Relationship	Email	Phone	Address	Note

Self Spouse Child Lawyer Power of Attorney Executor Tax Preparer Doctor Family Friend Other

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Assets to Assign

Asset	Location	Name	Phone Number	Notes

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Asset	Location	Name	Phone Number	Notes

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Asset List

Category	Type	Name	Account#	Name on Account	Email on account	Note

Financial Accts	Real Estate	Retirement Accts	Business Interests	Insurance	Personal Property	Digital Assets	Legal Rights	Other
Bank Checking	Primary Residence	IRA	Owner	Term Life	Vehicle: Car	Cryptocurrency	Trust Interest	529 Account
Bank Savings	Rental Property	ROTH	Co-Owner	Life Insurance	Vehicle: Boat	Intellectual Property	Royalties	
CD's	Vacation Home	401(k)	Shares - Private	Life Ins (cash value)	Vehicle: RV	Website	Notes receivable	
Stocks	Land/Undeveloped	SEP	Buy/Sell agreement	Long Term Care	Vehicle: Other	Amazon Seller, etc.	Mineral/Water	
Bonds	Timeshare	Simple	Deferred Compensation	Employer Provided		Digital (PayPal/Venmo)		
Health Savings		Mutual Funds	Cash Balance Plan	Disability				
Investments		Annuity	457					

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Asset List

Category	Type	Name	Account#	Name on Account	Email on account	Note

Financial Accts	Real Estate	Retirement Accts	Business Interests	Insurance	Personal Property	Digital Assets	Legal Rights	Other
Bank Checking	Primary Residence	IRA	Owner	Term Life	Vehicle: Car	Cryptocurrency	Trust Interest	529 Account
Bank Savings	Rental Property	ROTH	Co-Owner	Life Insurance	Vehicle: Boat	Intellectual Property	Royalties	
CD's	Vacation Home	401(k)	Shares - Private	Life Ins (cash value)	Vehicle: RV	Website	Notes receivable	
Stocks	Land/Undeveloped	SEP	Buy/Sell agreement	Long Term Care	Vehicle: Other	Amazon Seller, etc.	Mineral/Water	
Bonds	Timeshare	Simple	Deferred Compensation	Employer Provided		Digital (PayPal/Venmo)		
Health Savings		Mutual Funds	Cash Balance Plan	Disability				
Investments		Annuity	457					

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Liability Account List

Category	Type	Name	Account#	Name on Account	Email on account	Note

Real Estate
Mortgage
Home Equity Lines
Property Taxes

Consumer Debt
Credit Cards
Personal Loans
Auto Loans
Vehicle Loans
Retail Store
Margin Loans
Cryptocurrency loans

Household
Utilities
Insurance
Phone/Internet
Meal Kits
Amazon Subscribe
Clothing (Stitch Fix)
Clubs

Medical
MyChart
Long Term Care

Business
Loans
Line of Credit
Vendors
Lease
Insurance

Legal
Lawsuits
Alimony
Child Support
Settlements
Agreements

Subscriptions
Streaming Services
Software/Cloud
Apps
Services

Funeral
Burial
Funeral
Crematory

Other
Safe Deposit Box
Storage Unit
Memberships

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Liability Account List

Category	Type	Name	Account#	Name on Account	Email on account	Note

Real Estate
Mortgage
Home Equity Lines
Property Taxes

Consumer Debt
Credit Cards
Personal Loans
Auto Loans
Vehicle Loans
Retail Store
Margin Loans
Cryptocurrency loans

Household
Utilities
Insurance
Phone/Internet
Meal Kits
Amazon Subscribe
Clothing (Stitch Fix)
Clubs

Medical
MyChart
Long Term Care

Business
Loans
Line of Credit
Vendors
Lease
Insurance

Legal
Lawsuits
Alimony
Child Support
Settlements
Agreements

Subscriptions
Streaming Services
Software/Cloud
Apps
Services

Funeral
Burial
Funeral
Crematory

Other
Safe Deposit Box
Storage Unit
Memberships

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