



ROBINSON
& JONES
CO. LPA

ATTORNEYS AND COUNSELORS AT LAW

Your Personal and Asset Inventory





(513) 523-4111

Planning for your future – with the help of Robinson & Jones Co., L.P.A.

As part of our Wealth Management Plan, we provide you with the following Personal and Asset Inventory. The Inventory is designed to provide you and your loved ones with a comprehensive list your assets, where they are located, how they are titled and the beneficiaries of each.

The Inventory records all of your vital personal and financial information. Information. It covers a variety of critical topics – from your family records to legal documents – and keeps everything in one place. This easy-to-use resources is just one way our firm is dedicated to helping you with your estate plan, and help your family in the event of an emergency.

Remember, we are here whenever you need us, or when your loved ones need us.



Personal and Asset Inventory

Your Inventory should be reviewed frequently. It requires attention and updates to retain its effectiveness. Updating is easy with the electronic version of this document along with your estate planning documents.

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Personal Information

Spouse Information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

License number

State of issue

Spouse Information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

License number

State of issue

Child Information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

Personal information (continued)

Child information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

Child information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

Child information

Name (include previous names used)

Address

Phone number

Email

Date of Birth

Social Security number

Marital status (married/civil union, etc.)

Insurance – life/health/home/auto

Life insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Beneficiaries

Health insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Automobile insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Insurance – life/health/home/auto (continued)

Homeowners insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Mortgage insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Home warranty policy

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Insurance – life/health/home/auto (continued)

Other insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Other insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Other insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Professional advisors

Financial planner

Name

Account number

Address

Phone number

Email

Website

Investment advisor

Name

Account number

Address

Phone number

Email

Website

Accountant

Name

Account number

Address

Phone number

Email

Website

Lawyer

Name

Account number

Address

Phone number

Email

Website

Professional advisors (continued)

Physician

Name

Account number

Address

Phone number

Email

Website

Additional advisor

Name

Account number

Address

Phone number

Email

Website

Additional advisors

Name

Account number

Address

Phone number

Email

Website

Finances

Annuities

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Pension

Financial institution

Account number

Address

Account type

Phone number

Email

Website

401(k)

Financial institution

Account number

Address

Account type

Phone number

Email

Website

IRA

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Finances (continued)

Annuities

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Mutual funds

Financial institution

Account number

Address

Account type

Phone number

Email

Website

College savings plan

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Employers retirement plan

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Finances (continued)

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Safe deposit box

Financial institution

Box number

Address

Phone number

Email

Website

Finances (continued)

Mortgage

Lending institution

Loan number

Address

Phone number

Email

Website

Line of credit

Lending institution

Loan number

Address

Phone number

Email

Website

Credit card

Lending institution

Loan number

Address

Phone number

Email

Website

Credit card

Lending institution

Loan number

Address

Phone number

Email

Website

Finances (continued)

Credit card

Financial institution

Loan number

Address

Phone number

Email

Website

Automobile loan

Financial institution

Loan number

Address

Phone number

Email

Website

Student loan

Financial institution

Loan number

Address

Phone number

Email

Website

Taxes

Location of last year's taxes

Location of this year's taxes

Location(s) of income forms (1099, W-2, etc.)

Location of deductible receipts

Important legal documents

Will and/or revocable trust

Location of will/trust

Legal counsel for will/trust

Name

Address

Phone number

Email

Website

Additional mandates (in case of incapacity)

Legal power of attorney

Medical power of attorney

Executor/administrator of the estate

Name

Address

Phone

Email

Separation/divorce decree

Location of documents

Date of event

Legal counsel for contract

Address

Phone number

Email

Website

Important legal documents (continued)

Widow/widower

Location of spouse's death certificate

Date of death

Birth certificate/certificate of birth abroad/adoption decree

Location of husband's birth certificate

Date and location of birth

Location of husband's birth certificate

Date and location of birth

Location of wife's birth certificate

Date and location of birth

Location of children's birth certificate

Date and location of birth

Location of children's birth certificate

Date and location of birth

Location of children's birth certificate

Date and location of birth

Location of children's birth certificate

Date and location of birth

Adoption decree

Location of adoption decree

Date and location of birth

Passport and visa

Location of passport

Country and date of issue

Expiration date

Location of visa

Country and date of issue

Expiration date

Military documents/VA discharge papers

Location

Date of service

Date of discharge

Important legal documents (continued)

Mortgage closing paperwork

Location

Plot maps and boundary lines

Location

Deeds to real estate

Location

Automobile

Title location

Make

License number

Model

Other

Location of documents

Inventory of valuables

Jewelry, art, collectibles and furniture

Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost

Helpful information

Utilities and services

Gas company

Account number

Website

Phone number

Electric company

Account number

Website

Phone number

Water company

Account number

Website

Phone number

Phone company

Account number

Website

Phone number

Waste management company

Account number

Website

Phone number

Cable/satellite company

Account number

Website

Phone number

Home security company

Account number

Website

Phone number

Helpful information (continued)

Utilities and services

Internet company

Account number

Website

Phone number

Pest control company

Account number

Website

Phone number

Yard maintenance company

Account number

Website

Phone number

Gutter cleaning company

Account number

Website

Phone number

Pool and spa company

Account number

Website

Phone number

Medical professionals

Physician

Website

Address

Phone number

Dentist

Website

Address

Phone number

Helpful information (continued)

Medical professionals

Eye care professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number