

# Planning Beyond the Will

## Valuables



### Storage Information

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Do you have a safe deposit box?

Yes

No

If yes, name of bank, branch, and location:

Who is named on the signature card?

Do all parties named on the signature card have a key?

Yes

No

Account number:

Box number:

Key location:

Any other items to note:

Do you have a safe deposit box?

Yes

No

If yes, name of bank, branch, and location:

Who is named on the signature card?

Do all parties named on the signature card have a key?

Yes

No

Account number:

Box number:

Key location:

Any other items to note:

## Storage Information (continued)

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Do you have a safe?

Where is it located?

Where do you keep the key?

Does anyone else have a key or the combo?

Do you have a storage unit?

Yes

No

If yes, what is the name of the storage unit?

Address:

Key location or lock combination:

Payment information (including method, frequency, amount):

Special instructions:

## Heirlooms / Artwork

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**1.** Description of item:

Location:

Special instructions:

**2.** Description of item:

Location:

Special instructions:

**3.** Description of item:

Location:

Special instructions:

**4.** Description of item:

Location:

Special instructions:

## Heirlooms / Artwork (continued)

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**5.** Description of item:  
Location:  
Special instructions:

**6.** Description of item:  
Location:  
Special instructions:

## Books

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**1.** Name of book:  
Location:  
Special instructions:

**2.** Name of book:  
Location:  
Special instructions:

**3.** Name of book:  
Location:  
Special instructions:

**4.** Name of book:  
Location:  
Special instructions:

**5.** Name of book:  
Location:  
Special instructions:

**6.** Name of book:  
Location:  
Special instructions:

## Books (continued)

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**7.** Name of book:

Location:

Special instructions:

**8.** Name of book:

Location:

Special instructions:

**9.** Name of book:

Location:

Special instructions:

**10.** Name of book:

Location:

Special instructions:

## Jewelry

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**1.** Description of item:

Location:

Special instructions:

**2.** Description of item:

Location:

Special instructions:

**3.** Description of item:

Location:

Special instructions:

**4.** Description of item:

Location:

Special instructions:

## Jewelry (continued)

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- 5.** Description of item:  
Location:  
Special instructions:

- 6.** Description of item:  
Location:  
Special instructions:

## Wine / Spirits

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- 1.** Bottle information (producer, varietal, year, etc.):  
Bottle location:  
Special instructions:  
Anything else to note:

- 2.** Bottle information (producer, varietal, year, etc.):  
Bottle location:  
Special instructions:  
Anything else to note:

- 3.** Bottle information (producer, varietal, year, etc.):  
Bottle location:  
Special instructions:  
Anything else to note:

- 4.** Bottle information (producer, varietal, year, etc.):  
Bottle location:  
Special instructions:  
Anything else to note:

- 5.** Bottle information (producer, varietal, year, etc.):  
Bottle location:  
Special instructions:  
Anything else to note:

## Wine / Spirits (continued)

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**6.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**7.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**8.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**9.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**10.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**11.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

**12.** Bottle information (producer, varietal, year, etc.):

Bottle location:

Special instructions:

Anything else to note:

## Collection(s) / Musical Instruments / Other

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- 1.** Description:  
Location:  
Special instructions:
  
- 2.** Description:  
Location:  
Special instructions:
  
- 3.** Description:  
Location:  
Special instructions:
  
- 4.** Description:  
Location:  
Special instructions:
  
- 5.** Description:  
Location:  
Special instructions:
  
- 6.** Description:  
Location:  
Special instructions:
  
- 7.** Description:  
Location:  
Special instructions: