



HEIRLINE LEGAL SERVICES PLLC
PERSONAL INFORMATION INVENTORY

Full Legal Name: _____

Name you use on your state and federal income tax returns: _____

Home address: _____

Email addresses: _____

Cell phone no. _____

Land line phone no. _____

Social security no. _____

Birth date: _____

Place where you were born: _____

Citizenship: _____

Names of living parents: _____

Names of deceased parents: _____

If you are an enrolled member of an American Indian tribe:

Tribe: _____

Enrollment no.: _____

Blood quantum: _____

If you have served in the U.S. Armed Forces

Branch of service: _____

Rate or rank: _____

Date of discharge: _____

Classification of discharge: _____

Marital status:

____ Never married

____ Married, never divorced

____ Married, previously divorced

____ Married, common law

____ Married, ceremonial

____ Divorced –

State and county of divorce: _____

Case no. _____

Date of divorce decree: _____

Children: for each child, give the following information –

Name: _____

Birth date: _____

Born to you, or adopted by you? _____

Kept by you, or adopted out by you? _____

Name of other biological parent: _____

Is this child “special needs”? _____

If you have minor or special needs child, and you and your child’s other parent are not available to care for this child, give the name and contact information of the person you would want to take care of this child: _____

Grandchildren and Great-Grandchildren: for each, give the following information –

Name: _____

Birth date: _____

Names of parents: _____

Was this child adopted out, or kept? _____

Your siblings: for each of your siblings, give the following information –

Name: _____

Birth date: _____

If deceased, then year and place of death: _____

Full or half sibling? _____

Charitable organizations and purposes you have supported: _____

Religious affiliation: _____

Name and contact information of the person you would trust to manage your property for you, if you are not available to do this: _____

Name and contact information of the person you would trust to make medical and care arrangement decisions for you if you are not available to do this: _____

YOUR PLAN DOCUMENTS

Name of your successor trusted persons (“fiduciaries”) (when your spouse is no longer available):

For your trust: _____

For your asset power of attorney: _____

For your health care power of attorney: _____

For your last will and testament: _____

For your advance directive for health care: _____

Where are the originals of your estate planning legal documents being kept:

If this is a locked location (including a safe deposit box), where is the combination or the key kept:

ASSETS

Note: Put supporting documents (such as deeds, statements of account, and life insurance policy statements) in a notebook or other segmented storage device, under the reference number.

Ref. No.

1. Federal and state income tax returns
2. Marriage license, if applicable
3. DD-214, if discharged from the U.S. armed forces
4. List of property owned before marriage or received as an inheritance or a gift during marriage
5. List of usernames and passwords for digital accounts
6. Safe deposit box information
7. Vehicle certificates of title
8. Real property in Oklahoma owned in your own name

9. Real property outside of Oklahoma owned in your own name
10. Time share
11. Oil, gas and other mineral interests (include deeds, leases, division orders, partnership agreements, stubs from most recent payments received)
12. Digital currency (include wallet access information)
13. U.S. Savings Bonds
14. Savings bonds issued by a non-U.S. sovereign
15. Bank accounts in the United States (include ownership card, beneficiary designation card, recent statement of account)
16. Bank accounts in outside the United States (include ownership card, beneficiary designation card, recent statement of account)
17. Investment accounts in the United States, which are not tax-qualified (such as IRAs, 401(k), 403(b), 457 or 529 Plan) (include account opening form, beneficiary designation form, recent statement of account)
18. Tax-qualified investment accounts in the United States (include account opening form, beneficiary designation form, recent statement of account)
19. All investment accounts outside the United States (include account opening form, beneficiary designation form, recent statement of account)
20. Certificates for shares of publicly traded companies
21. Life insurance policies (include the policy, and recent statement)

22. Long-term care policies (include the policy, and recent statement)
23. Name of any trust settled by someone other than you, of which you are a beneficiary (include trustee information, and recent trustee accounting)
24. Shares of closely held corporation(s), copy of bylaws, and copies of any agreements between shareholders
25. Units or ownership certificates for interests in limited liability companies, copy of operating agreement, and copies of any other agreements between members
26. Ownership certificates for interests in limited partnerships, and copy of operating agreement, and copies of any other agreements between partners
27. For sole proprietorship: Documents relating to ownership, organization and authorization to do business
28. For sole proprietorship: List of inventory
29. For sole proprietorship: List of equipment
30. For sole proprietorship: Customer list and vendor list
31. Intellectual property rights
32. Stock option agreements
33. Firearm information (including make, model and serial no., and government authorization to own restricted [class 3] firearms)
34. Promissory notes payable to you (including the note and payment schedule)

35. Written evidence of an advancement of an inheritance to any of your children or other heirs
36. Separately insured tangible property: Jewelry)
37. Separately insured tangible property: Art works
38. Separately insured tangible property: Antiques
39. Separately insured tangible property: Classic cars
40. Other separately insured tangible property (not vehicles for common use)
41. List of family heirlooms (include picture and written description, perhaps with the family lore associated with the item)
42. Documents relating to any of your genetic material preserved in storage
43. Information relating to thoroughbred animals (including breeding papers, medical papers, and care giver information)
44. Interests in restricted Indian land or trust funds
45. Contact information of your advisors and assistants (attorney, accountant or bookkeeper, insurance agent and investment advisor)