Law Office of
Patrick Sullivan, P.C.

Personal Financial Information Sheet

This Information Sheet will contain sensitive information please keep it in a secure location or the Law Office of Patrick Sullivan, P.C. can keep it with your Last Will & Testament.

The primary purpose of this document is to simplify the job of your personal representative so that they can easily identify your assets.

Personal Information

- Full Legal Name:
- Address:
- Date of Birth:
- Birthplace:
- Employer:
- Marital Status:
- Spouse's name:
- Mother's Name and Birthplace:
- Father's Name and Birthplace:

Legal Document Locations

- Last Will & Testament:
- Financial Power of Attorney:
- Healthcare Power of Attorney:
- Trust Documents:
- Pre/Postnuptial Agreement:
- Living Will:
- Deeds:
- Birth Certificate:
- Social Security Card:
- Marriage Certificate:
- Passport:
- Military Discharge Papers:
- Business Ownership Interests:
- Executor:
- Guardian of Children:
- Trustee:

Financial Document Locations

Where possible please include the institution holding the account, account numbers, other owners on accounts, approximate balance, and the location of statements

- Tax Returns:
- Bank Accounts:
- Investment Accounts:
- Retirement Accounts/Pensions:
- Employee Benefit Plans:
- Life Insurance Policies:
- Funeral Insurance:
- Health Insurer:
- Homeowners/Renters Insurer:
- Auto Insurer:
- Mortgage Documents:
- Credit Card Issuers:
- Other Loans:
- Car Titles:

Other Important Information

Where possible please specify box number and the key location/combination

- Safe Deposit Box:
- P.O. Box:

Advisors

Where possible please specify name, firm, address, phone number, and email.

- Attorney:
- Insurance Agent:
- CPA:
- Financial Advisor:

This document was completed on __________________.

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Signature