

INVESTMENTS & INSURANCE SUMMARY TABLE

NAME:

Investments & Insurance Accounts	COMPANY	ACCOUNT #	ISSUE DATE	MATURITY DATE	AMOUNT	Primary Beneficiary	Contingent Beneficiary
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		

OTHER								
Accountant								
Estate Planning								
Life Insurance								
Life Insurance								
Health Insurance								
Health Insurance								
Prescription Plan								
Prescription Plan								
Property & Casualty								
Home/Rental Insurance								
Automobile Insurance								

VITAL DOCUMENTS LOCATOR FOR:

(Last Name, First Name, Middle Initial)

Date

Documents	A	B	C	D	E	F
Last Will and Testament						
Revocable Living Trust						
Living Will						
Durable Powers of Attorney (Finances)						
Durable Power of Attorney for Healthcare						
Deeds to Property						
Property Tax Bills						
Time Share Deeds						
Promissory Notes						
Mobile Home Registration						
Installment Contracts						
Life Insurance						
Annuities						
Stock and Bond Certificates						
Checkbooks						
Tax Records						
CD Certificates						
Limited Partnership Papers						
Oil and Gas Interest Forms						
Marriage Certificates						
Birth Certificates						
Death Certificates						
Divorce Papers						
Military Discharge Papers						
Military Pension Document						
Social Security Card						
Immigration Papers						
Naturalization Papers						
Passports						
Vehicle Registration						
Adoption Papers						
Medical Insurance Information						
Retirement Plans						

LOCATIONS:

Compliments of: **Chad J. Karl**, Certified Financial Planner™ Professional

“Creating Financial Strategies for Your Retirement Goals”

- A. _____
- B. _____
- C. _____
- D. _____
- E. _____
- F. _____

Important Contacts

Financial Planner	Real Estate Agent
Name: Chad J. Karl, Certified Financial Planner™	Name:
Address: 33 E. Racine St. Janesville WI 53545	Address:
Phone: 608-758-2222 / Toll free 866-765-2423	Phone:
Email: ckarl@chadkarl.com	Email:
Insurance Agent	Landlord
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
Accountant/ Tax Preparer:	Business Associate
Name: Alan Lemke, MBA/ Jennifer Gaethke	Name:
Address: 33 E. Racine St., Janesville, WI 53545	Address:
Phone: 608-758-2222	Phone:
Email: alemke@chadkarl.com	Email:
Attorney:	Funeral Home
Name: Elder Advisors Law	Name:
101 S. Main Street, Ste 100 Janesville, WI 53545	Address:
Phone: (608) 371-7207	Phone:
Email: contact@elderadvisorslaw.com	Email:
Doctor	Executor
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
Banking Contact	Pastor
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email: