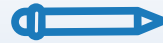


INFORMATION WORKSHEET



Advisors' Information:

Attorney
CPA
Financial Advisor
Insurance Agent
Successor Trustee



Digital Life

Email
Social Media



Banking

Bank Name
Account Type
Account Numbers
Titling



Property/Casualty Insurance:

Company Name
Homeowners Insurance
Personal Articles
Policies
Auto Insurance
Umbrella Policy



Debt/Mortgage Liabilities:

Company Name
Credit Cards
Mortgage Debt
Personal Loan



Brokerage:

Firm Name
Account Type
Account Numbers
Titling
Beneficiaries

The Daniel Plan



Life Insurance:

Insurance Company Name
Insurance Type
Death Benefit
Policy Numbers
Premium Schedule
Long Term Care Insurance



Company Retirement

Employer plans type
Stock Options
Group Life Insurance
Long Term Care Ins.
Pension



Other Assets:

Real Estate
Private Investments
Cars/Boats
Jewelry/Art
Other Valuables



Important Documents:

Social Security Cards
Birth Certificates
Divorce Decrees
Pre-Nuptial Agreement
Trust/Estate Documents
Marriage Certificate
Title/Pink Slips
Code/Keys to safe/filing cabinet
Copy of most recent 2 tax returns
Drivers License Information
Mothers Maiden Name



The Daniel Plan

The Seamark Legacy Group at Morgan Stanley

What is “The Daniel Plan”?

- The Daniel Plan was created to honor a dear friend of ours who suddenly passed away. He left behind a wife and three small children. By going through this experience personally, we were inspired to create The Daniel Plan to help families become more organized be sure both spouses have some understanding of the family financial picture.
- On the other side of this page is a QR Code that links to our website. There you will find worksheets we created for you to keep in your safe/with your trust documents and on your hard drive for both you and your spouse to access if needed.
- If you feel that your financial picture is missing any of these items, please feel free to contact us. We are happy to help build your financial plan and be sure there are no holes in your financial picture.

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