INFORMATION WORKSHEET

The Daniel Plan

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

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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