



# CHRIST CHURCH

ST. MICHAEL'S PARISH

FOUNDED 1672

The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.

—*The Book of Common Prayer*, p. 445

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*In Time of  
Death*

# Estate & Financial Packet

For Those Responsible  
For My Affairs  
In the Event of My Death

Name

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Address

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Date

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**CHRIST CHURCH - St. Michael's Parish**

This form is designed to assist those who wish to provide estate and financial information to the individual responsible for managing your final affairs. We suggest you provide a copy of this to the executor of your estate, your attorney and keep the original in a safe and secure place (i.e. safety deposit box). Please do not return this to Christ Church.

The following information will be needed for official certification. Accuracy is important. Claims, benefits, and legal procedures may be involved. This may become a permanent record for your family.

**My Estate**

**Will/Trust:**

Do you have a will? *(Please circle)*

Yes

No

\_\_\_\_\_

*Date of Last Will*

\_\_\_\_\_

*Location of Will*

\_\_\_\_\_

*Date of Last Codicil*

\_\_\_\_\_

*City, State*

Do you have a trust? *(Please circle)*

Yes

No

\_\_\_\_\_

*Date of Last Trust*

*Location of Trust*

*Date of Last Codicil*

*City, State*

**Executor of My Estate:**

*Name*

*City, State*

*Relationship*

*Telephone Number*

*Street Address*

*My Social Security Number*

**Attorney:**

*Name*

*City, State*

*Name of Firm*

*Telephone Number*

*Street Address*

**Banking Information:**

**Checking:**

*Name of Bank*

*Name of Bank*

*Street Address*

*Street Address*

*City, State*

*City, State*

*Telephone Number*

*Telephone Number*

*Account #*

*Account #*

**Savings Account:**

*Name of Bank*

*City, State*

*Street Address*

*Telephone Number*

*Account #*

*City, State*

*Name of Bank*

*Telephone Number*

*Street Address*

*Account #*

**Safety Deposit Box:**

*Name of Bank*

*Name of Bank*

*Street Address*

*Street Address*

*City, State*

*City, State*

*Telephone Number*

*Telephone Number*

*Box# & Location of Key*

*Box # & Location of Key*

**Investment Accounts:**

*Name of Company*

*City, State*

*Street Address*

*Telephone Number*

*City, State*

*Account #*

*Telephone Number*

*Name of Company*

*Account #*

*Street Address*

*City, State*

*Name of Company*

*Telephone Number*

*Street Address*

*Account #*

City, State

Telephone Number

Name of Company

Account #

Street Address

**Insurance/Pension Information:  
Medical Coverage:**

Name of Plan

Name of Plan

Street Address

Street Address

City, State

City, State

Telephone Number

Telephone Number

Policy#

Policy#

**Life Insurance:**

Name of Plan

Name of Plan

Street Address

Street Address

City, State

City, State

Telephone Number

Telephone Number

Policy#

Policy#

**Pension:**

Name of Plan

Street Address

City, State

*Street Address*

*Telephone Number*

*City, State*

*Policy#*

*Telephone Number*

*Name of Plan*

*Policy#*

**Outstanding Loans; Leases; credit cards; charge accounts; mortgage; other obligations:**

*Name*

*Name*

*Street Address*

*Street Address*

*City, State*

*City, State*

*Telephone Number*

*Telephone Number*

*Account #*

*Account #*

*Name*

*Name*

*Street Address*

*Street Address*

*City, State*

*City, State*

*Telephone Number*

*Telephone Number*

*Account#*

*Account#*

**In the spaces below indicate where other important papers may be found. Include, for example, real estate deeds, birth certificates, marriage certificates, divorce decrees, membership agreements in fraternal/union/employee groups, stocks, bonds, trust fund data, veterans discharge papers – or any other information which you consider important.**

*Document*

*Where Kept*

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*Street Address*

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*City, State*

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*Document*

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*Where Kept*

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*Street Address*

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*City, State*

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*City, State*

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*Where Kept*

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*Street Address*

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*City, State*










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*Legal Signature*

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*Date*



CHRIST CHURCH  
ST. MICHAEL'S PARISH  
FOUNDED 1672

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