



Date: 9/1/24

Additional Documents located in:



LONG GUNS					
MANUFACTURE	MODEL	SERIAL	STORED	<input type="checkbox"/>	<input type="checkbox"/>
REMINGTON	3006	1-XXX-23487	BASEMENT SAFE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COLT	1211	2-XXX-2131	BASEMENT SAFE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

PISTOLS					
MANUFACTURE	MODEL	SERIAL	STORED	<input type="checkbox"/>	<input type="checkbox"/>
GLOCK	22	1-XXX-2213	BASEMENT SAFE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GLOCK	23	2-XXX-5644	BEDROOM SAFE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

SHOTGUNS					
MANUFACTURE	MODEL	SERIAL	STORED	<input type="checkbox"/>	<input type="checkbox"/>
S+W	12008	1-XXX-4456	BASEMENT SAFE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

NOTES					
GLOCK 23 IN BEDROOM IS LOADED!				<input type="checkbox"/>	<input type="checkbox"/>
ALL OTHER GUNS ARE UNLOADED (BUT ALWAYS CHECK!)				<input type="checkbox"/>	<input type="checkbox"/>
ALL GUNS HAVE TRIGGER LOCKS INSTALLED				<input type="checkbox"/>	<input type="checkbox"/>
ALL AMMO STORED IN BASEMENT SAFE OTHER THEN				<input type="checkbox"/>	<input type="checkbox"/>
WHAT IS IN BEDROOM SAFE (LOADED GLOCK 23)				<input type="checkbox"/>	<input type="checkbox"/>



Date: 11/15/24

Additional Documents located in:



IRA'S				<input type="checkbox"/>	<input type="checkbox"/>
TYPE.	COMPANY/ACCT#	BENEFICIARIES.	CONTACT INFO	<input type="checkbox"/>	<input type="checkbox"/>
JOHN IRA TRAD.	VANGUARD XXX-234.	BILL SMITH.	800-555-1235	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JOHN IRA ROTH.	SCHWAB XXX-288.	JANE SMITH.	800-555-3422	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CONNIE IRA TRAD.	VANGUARD XXX-343.	BILL SMITH.	800-555-1235	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CONNIE IRA ROTH.	SCHWAB XXX-231.	JANE SMITH.	800-555-3422	<input checked="" type="checkbox"/>	<input type="checkbox"/>

JOHN'S EMPLOYER PROVIDED				<input type="checkbox"/>	<input type="checkbox"/>
TYPE.	ACCT#	BENEFICIARIES.	CONTACT INFO	<input type="checkbox"/>	<input type="checkbox"/>
401K DOW	34-XXX-989.	BILL SMITH.	800-555-2234	<input checked="" type="checkbox"/>	<input type="checkbox"/>
401K CORNING.	45-XX-3456.	JANE SMITH	800-555-4363	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GM PENSION.	467-XX-435.	BILL SMITH.	855-555-9585	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

CONNIE'S EMPLOYER PROVIDED				<input type="checkbox"/>	<input type="checkbox"/>
TYPE.	ACCT#	BENEFICIARIES.	CONTACT INFO	<input type="checkbox"/>	<input type="checkbox"/>
401K FORD	98-XXX-989.	BILL SMITH.	800-555-2234	<input checked="" type="checkbox"/>	<input type="checkbox"/>
401K GM.	12-XX-3456.	JANE SMITH	800-555-4363	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GM PENSION.	342-XX-435.	BILL SMITH.	855-555-9585	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

GOVERNMENT				<input type="checkbox"/>	<input type="checkbox"/>
TYPE.	ACCT#	NAME.		<input type="checkbox"/>	<input type="checkbox"/>
SOC. SEC.	123-XXX-1234	JOHN SMITH		<input type="checkbox"/>	<input type="checkbox"/>
VA BENEFITS.	234-XX-3434	JOHN SMITH		<input type="checkbox"/>	<input type="checkbox"/>
SOC. SEC.	234-XX-5678.	CONNIE SMITH		<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>



Date: 3/15/24

Additional Documents located in:



PERSONAL					
RETURNS	PREPARED BY			<input type="checkbox"/>	<input checked="" type="checkbox"/>
STATE - JOINT.	ALLAN CPA.	JIM ALLAN.	248-555-2311	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FEDERAL - JOINT	ALLAN CPA			<input type="checkbox"/>	<input checked="" type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

BUSINESS					
RETURNS	PREPARED BY			<input type="checkbox"/>	<input checked="" type="checkbox"/>
STATE	ALLAN CPA.	JIM ALLAN.	248-555-2311	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FEDERAL	ALLAN CPA			<input type="checkbox"/>	<input checked="" type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

NOTE					
				<input type="checkbox"/>	<input type="checkbox"/>
ALLAN CPA HAS PREPARED ALL RETURNS SINCE 2011 AND				<input type="checkbox"/>	<input type="checkbox"/>
WILL HAVE HISTORIC COPIES OF RETURNS.				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>



Date: 2/23/21

Additional Documents located in:



123 GLENN DR			
	COMPANY	ACCT #	
TAX STATEMENT			<input type="checkbox"/>
INSURANCE.	USAA.	123-XXX-32	<input checked="" type="checkbox"/>
MORTGAGE	ROCKET MORTGAGE	23-XXX-876	<input type="checkbox"/>
DEED			<input checked="" type="checkbox"/>

23 LAKE DR			
	COMPANY	ACCT #	
TAX STATEMENT			<input checked="" type="checkbox"/>
INSURANCE.	USAA.	232-XXX-382	<input checked="" type="checkbox"/>
MORTGAGE	BOA.	223-XXX-876	<input type="checkbox"/>
DEED			<input checked="" type="checkbox"/>

STORAGE LOCKER - BECK RD.			
VSTORE, 23 BECK RD, MILFORD 45345			<input checked="" type="checkbox"/>
UNIT 233, \$300 / MONTH, PAID UNTIL 2025			<input type="checkbox"/>
GATE CODE: 3434			<input type="checkbox"/>
LOCK CODE 3214			<input type="checkbox"/>

			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>



Date: 9/23/24

Additional Documents located in:



ROVER DOB 4/9/23			
PET CARE PLAN			<input type="checkbox"/> <input checked="" type="checkbox"/>
MEDICAL RECORDS			<input checked="" type="checkbox"/> <input type="checkbox"/>
CAREGIVER CONTACT	JOHN MORRIS 248-555-3243		<input checked="" type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
MICROCHIP	CHIP # 1-XXX-45867		<input type="checkbox"/> <input type="checkbox"/>

HONEY DOB 3/9/21			
PET CARE PLAN			<input type="checkbox"/> <input checked="" type="checkbox"/>
MEDICAL RECORDS			<input checked="" type="checkbox"/> <input type="checkbox"/>
PET TRUST ATTORNEY	JOHN MORRIS 248-555-3243		<input checked="" type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
MICROCHIP	CHIP # 2-XXX-43980		<input type="checkbox"/> <input type="checkbox"/>

			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>

			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/> <input type="checkbox"/>

Date: **2/3/23**

Additional Documents located in:



PASSWORD MANAGER			
1	PASSWORD		
	RECOVERY MASTER SHEET		
AUTO FAIL OVER TO JOHNJR@GMAIL.COM IF NOT ACCESSED FOR 3 WEEKS.			

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

CONNIE'S PHONE / EMAIL			
DEVICE	USERNAME	PASSWORD	2 FACTOR
IPHONE		123456	TO EMAIL
GMAIL	CONNIE@GMAIL.COM	123456!@	TO TEXT

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

JOHN'S PHONE / EMAIL			
DEVICE	USERNAME	PASSWORD	2 FACTOR
IPHONE		876543	TO EMAIL
GMAIL	JOHN@GMAIL.COM	321456!@	TO TEXT

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>



Date: **9/3/24**

Additional Documents located in:



JOHN'S DOCS

DOCUMENT	DATE		
DIVORCE	1/5/16		
PRE-NUP	8/3/17		

-
-
-
-
-

CONNIE'S DOCS

DOCUMENT	DATE		
PRE-NUP	8/3/17		

-
-
-
-
-

JOHN'S RECORDS

BIRTH			
MILITARY			
MARRIAGE			

-
-
-
-
-

JOHN'S BUSINESS

SALE			
EARN OUT / STOCK			

-
-
-
-
-

Date: **1/2/24**

Additional Documents located in:



JOHN'S LIFE INSURANCE			
COMPANY	POLICY #	AMOUNT	BENEFICIARIES
NYL	1-XXX-3324	\$500,000	SPOUSE/SON

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

JOHN'S ANNUITIES			
COMPANY	POLICY #	AMOUNT	BENEFICIARIES
PRUDENTIAL	2-XXX-223	\$40,000	SPOUSE

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

JOHN'S DISABILITY			
COMPANY	POLICY #		
BCBS	3-XXX-380		

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>



Date: 7/1/18

Additional Documents located in:



JOHN'S FUNERAL				
FUNERAL HOME			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SULLIVAN + LYNCH			<input type="checkbox"/>	<input type="checkbox"/>
TOM LYNCH - 248-555-9987			<input type="checkbox"/>	<input type="checkbox"/>
FUNERAL IS PRE-PAID; CEMETERY IS PRE-PAID			<input checked="" type="checkbox"/>	<input type="checkbox"/>
MY WISHES/INSTRUCTIONS			<input checked="" type="checkbox"/>	<input type="checkbox"/>

CONNIE'S FUNERAL				
FUNERAL HOME			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SULLIVAN + LYNCH			<input type="checkbox"/>	<input type="checkbox"/>
TOM LYNCH - 248-555-9987			<input type="checkbox"/>	<input type="checkbox"/>
FUNERAL IS NOT PRE-PAID; CEMETERY IS PRE-PAID			<input checked="" type="checkbox"/>	<input type="checkbox"/>
MY WISHES/INSTRUCTIONS			<input checked="" type="checkbox"/>	<input type="checkbox"/>

			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>



Date: 9/13/24

Additional Documents located in:



JOHN'S DOCUMENTS					
FINANCIAL POA	LAST UPDATED		ATTORNEY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MEDICAL POA		9/21	MIKE SILVER	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MEDICAL DIRECTIVES		9/21	313-555-9876	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TRUST		9/21		<input type="checkbox"/>	<input checked="" type="checkbox"/>
WILL		7/19		<input type="checkbox"/>	<input checked="" type="checkbox"/>

CONNIE'S DOCUMENTS					
FINANCIAL POA	LAST UPDATED		ATTORNEY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MEDICAL POA		9/21	MIKE SILVER	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MEDICAL DIRECTIVES		9/18	313-555-9876	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TRUST		9/21		<input type="checkbox"/>	<input checked="" type="checkbox"/>
WILL		7/19		<input type="checkbox"/>	<input checked="" type="checkbox"/>

				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>



Date: 9/24/24

Additional Documents located in:

**BANK ACCOUNTS**

BANK	TYPE	ACCT. #	CONTACT/#
COMERICA	CHECKING	XXX-555-234	BILL WILSON 248-555-9876
BOA	SAVINGS	XXX-322-287	JILL BROWN 248-555-2311

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

BANK ACCOUNTS CONT.

BANK	TYPE	ACCT. #	CONTACT/#
COMERICA	SAVINGS	XXX-121-294	BILL WILSON 248-555-9876

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

INVESTMENT ACCOUNTS

COMPANY	ACCT #	ADVISOR	PHONE
MERRILL	XXX-211-222	STEVE SMITH	248-555-1124
VANGUARD	XXX-159-098	-	800-555-2121

<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

STOCK CERTIFICATES

COMPANY	# OF SHARES	CONTACT	PHONE
DTW	1,000	JANICE WRITE	248-555-2112

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>