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ESTATE ASSET & INFORMATION ORGANIZER

A practical roadmap for your executor, successor trustee, agent, and family

Client 1:	
Client 2 (if applicable):	

Why this organizer matters

This organizer is primarily for you and the people who may someday need to step in and manage or settle your affairs. Its purpose is to leave a clear roadmap showing what you own, what you owe, where records are kept, who to contact, and how important accounts or property can be identified. It can also help your attorney spot estate-planning or trust-funding issues, but you do not need to prepare a perfect balance sheet for the law firm.

You generally do not need exact balances or full account numbers. Identify each item well enough that a trusted person can find it later, and note where the most recent statement, title, policy, contract, or other record is kept.

Date first completed: ____________________ Last updated: ____________________

Keep the completed organizer in a secure place and tell your executor, successor trustee, or other trusted person where it can be found.

How to Use This Organizer

- Complete only the sections that apply to you. If something does not apply, leave it blank or write "N/A."
- Approximate values are fine. For most accounts, the institution name and last four digits are enough to identify the account.
- If it is easier, attach a recent statement and simply write "see attached statement" in the table.
- For assets with beneficiary, POD, or TOD designations, note the current designation if you know it. If you are unsure, write "unknown" and verify it later.
- For inherited or gifted property, or property you believe is separate rather than community property, make a note in the ownership/notes column.
- Do not list every asset owned by an LLC, corporation, or partnership. Instead, list your ownership interest in the business and where the entity records are kept.
- Update this organizer at least once a year and after major changes such as a move, marriage or divorce, death of a beneficiary or fiduciary, retirement, major purchase or sale, new business, or significant account changes.

Important security note

Passwords and highly sensitive access information should usually be stored separately from the main organizer. The main form should normally identify where passwords, recovery codes, device PINs, and similar credentials are stored (for example, a password manager, sealed envelope, or secure safe).

An optional Secure Access Appendix is included at the end if you choose to record credentials directly. If you use it, store it separately and do not email it or send it to the law firm unless specifically requested through a secure method.

This organizer does not change legal ownership or access rights

Completing this form does not transfer property, change title, update a beneficiary designation, or give another person legal authority to access an account. Digital access in particular may be governed by your estate-planning documents, applicable law, and the provider's terms of service. Use this organizer as a roadmap, and make any legal or beneficiary changes separately.

Sections included

- Estate plan roadmap and key people
- Real estate, mineral interests, and property records
- Banking, cash, and payment accounts
- Investments, retirement, and employment benefits
- Insurance and annuities
- Business interests, intellectual property, trusts, and money owed to you
- Vehicles, valuables, and storage
- Mortgages, credit cards, and other liabilities
- Recurring bills and automatic payments
- Digital accounts, devices, and cryptocurrency
- Important records and professional contacts
- Annual review log and optional Secure Access Appendix

1. Estate Plan Roadmap and Key People

This page should help a trusted person quickly find the controlling documents and know whom to call first.

Estate-planning documents and where the originals are kept

Document	Date / Name	Original location	Copy / Notes
Will(s)			
Revocable or other trust(s)			
Durable power(s) of attorney			
Medical power(s) of attorney / directives			
Deeds / transfer-on-death deeds			
Premarital / postmarital / property agreement			
Funeral / burial / cremation instructions or contract			
Other important estate document			

People named to help manage or settle your affairs

Role	Name	Phone / Email	Notes
Executor			
Alternate executor			
Successor trustee			

Role	Name	Phone / Email	Notes
Agent under financial power of attorney			
Medical agent			
Other trusted person / family contact			

Tip: The person serving in one of these roles should at least know that the estate plan exists and where the original documents and this organizer can be found.

2. Real Estate, Mineral Interests, and Property Records

List homes, rental property, land, timeshares, and real estate located in another state or country. Use the notes column for inherited/separate property, co-owners, property managers, or unusual ownership arrangements.

Property / Address	Owner / How Titled	Mortgage / Lender	Approx. Value (optional)	Deed, Tax & Insurance Records / Notes

Oil, gas, mineral, royalty, timeshare, or other real-property interests

Interest / Location	Owner	Operator / Payor / Account	Approx. Value or Income	Records / Notes

Property-related contacts

Property	Property manager / HOA / Agent	Phone / Email	Insurance carrier / policy	Notes

3. Banking, Cash, and Payment Accounts

Include checking, savings, money-market accounts, certificates of deposit, credit-union accounts, and significant cash accounts. If an account has a POD beneficiary, note it if known.

Institution	Account Type	Owner / Title	Last 4 Digits	POD / Beneficiary (if any)	Statements / Access Notes

Cash-management and payment accounts

Examples: PayPal, Venmo, Cash App, prepaid cards, online savings platforms, or other accounts that may hold a meaningful balance.

Service / Institution	Owner	Username / Email	Balance (optional)	Credential Location / Notes

4. Investments, Retirement, and Employment Benefits

Brokerage, mutual fund, securities, and investment accounts

Institution	Account Type	Owner / Title	Last 4 Digits	TOD / Beneficiary	Approx. Value	Statements / Notes

Retirement and employment benefits

Employer / Institution	Plan Type	Participan t	Last 4 / ID	Primary / Contingent Beneficiary	Approx. Value / Benefit	Records / HR Contact

Examples include 401(k), 403(b), 457, IRA/Roth IRA, pension, deferred compensation, employee stock plans, stock options, HSA, and similar benefits. Do not change retirement beneficiaries without considering possible tax consequences.

5. Insurance and Annuities

Life insurance and annuities

Carrier	Policy / Contract (last 4)	Insured / Owner	Benefit / Value	Primary / Contingent Beneficiary	Agent / Premium Method	Policy Records

Other insurance that may need attention during incapacity or estate administration

Type (home, auto, umbrella, LTC, etc.)	Carrier / Policy	Property / Person Covered	Agent / Phone	Premium / Autopay	Records / Notes

Property and liability coverage can be important while an executor or trustee is maintaining a home, vehicle, or other asset before it is sold or distributed.

6. Business Interests, Intellectual Property, Trust Interests, and Money Owed to You

Businesses, LLCs, corporations, partnerships, and sole proprietorships

Business / Entity	Type / State	Owner & % Interest	Co-owners / Key Contact	Operating / Buy-Sell Records	Approx. Value / Notes

List your ownership interest rather than every asset owned by the company. Note where operating agreements, shareholder agreements, partnership agreements, buy-sell agreements, and recent tax or financial records are kept.

Loans, promissory notes, mortgages, or other amounts owed to you

Debtor / Payor	Amount / Balance	Payment Terms	Collateral (if any)	Original Note / Records	Notes

Trust, estate, intellectual-property, royalty, or other beneficial interests

Asset / Interest	Owner / Beneficiary	Trustee / Payor / Contact	Approx. Value / Income	Documents / Renewal / Notes

7. Vehicles, Valuable Personal Property, Storage, and Safes

Vehicles, boats, RVs, trailers, and similar titled property

Year / Make / Model	VIN / Serial (last 6)	Title Owner	Loan / Lender	Title & Insurance Records	Location / Notes

Jewelry, art, collectibles, precious metals, equipment, or other valuable/sentimental property

Item / Collection	Owner	Approx. Value	Where Located	Appraisal / Insurance / Inventory	Special Notes

Safe-deposit boxes, home safes, storage units, and other secured locations

Type / Institution	Address / Branch	Box / Unit No.	Who Has Access	Key / Code / Access Info Location	Contents / Notes

Do not put the access code itself in this table unless you are comfortable storing the entire organizer at that level of security. It is usually better to state where the code or key can be found.

8. Mortgages, Credit Cards, and Other Liabilities

Mortgages, HELOCs, vehicle loans, and other secured debt

Creditor / Lender	Debt Type / Secured By	Borrower(s)	Last 4 / Loan ID	Approx. Balance	Payment / Autopay / Records

Credit cards and lines of credit

Issuer	Cardholder	Last 4	Approx. Balance	Autopay From	Recurring Charges / Statement Location

Other debts, guarantees, leases, taxes, or contingent liabilities

Creditor / Obligation	Type	Who Is Liable	Approx. Amount	Due / Payment Terms	Records / Notes

9. Recurring Bills and Financial Continuity

This section can save an agent, executor, or trustee a great deal of time by showing which payments must be maintained or cancelled.

Expense / Service	Provider	Approx. Amount	Frequency / Due Date	Paid From / Autopay	Account / Contact / Cancellation Notes
Mortgage / rent					
Property taxes / HOA					
Home / auto / umbrella insurance					
Electric / gas / water					
Internet / phone / alarm					
Vehicle loan / lease					
Storage unit / safe-deposit box					
Subscriptions / memberships					
Caregiver / household payroll / services					
Business obligations					
Other recurring payment					

Expense / Service	Provider	Approx. Amount	Frequency / Due Date	Paid From / Autopay	Account / Contact / Cancellation Notes
Other recurring payment					

Consider highlighting expenses that must continue immediately after death or incapacity, such as mortgage payments, insurance, utilities, property taxes, HOA dues, payroll, and business obligations.

10. Digital Accounts, Devices, and Online Property

The goal here is to identify what exists and how a legally authorized person can find it. For sensitive credentials, record the location of the password or recovery information rather than the password itself. Use the optional Secure Access Appendix only if you want to record credentials directly.

Core digital access

Account / Device	Provider / Model	Username / Email	MFA / Recovery Method	Credential / Recovery Info Location	Notes / Desired Action
Primary email					
Secondary email					
Cell phone / mobile carrier					
Primary computer					
Tablet / other device					
Password manager					

Other online accounts and digital property

Service / Asset	Type / Purpose	Username / Email	Value / Revenue (if any)	Credential Location	Keep / Transfer / Close / Notes

Service / Asset	Type / Purpose	Username / Email	Value / Revenue (if any)	Credential Location	Keep / Transfer / Close / Notes

Examples: cloud storage, photo libraries, social media, domain names, websites, online stores, creator accounts, software licenses, airline miles/loyalty programs, digital subscriptions, and monetized online content.

11. Cryptocurrency and Other Digital Financial Assets

Digital financial assets can be lost permanently if the existence of the account or the recovery method cannot be identified. Record enough information for a trusted person to locate the asset and the recovery materials.

Exchange / Wallet / Asset	Owner	Account / Wallet Identifier	Approx. Value	Hardware Device Location	Seed Phrase / Private Key / MFA Location	Notes

Security warning: Do NOT write a crypto seed phrase or private key in this organizer. Instead, state where the sealed or otherwise secured recovery information is kept. Anyone who obtains a seed phrase or private key may be able to control the asset.

Other digital financial items

Asset / Platform	Owner	Identifier	Approx. Value	Access / Recovery Location	Notes

Asset / Platform	Owner	Identifier	Approx. Value	Access / Recovery Location	Notes

12. Important Records and Professional Contacts

Where important records are kept

Record	Physical / Electronic Location	Access Instructions / Notes
Estate planning originals		
Real estate deeds / closing files		
Vehicle titles		
Insurance policies / beneficiary confirmations		
Recent tax returns (at least 2 years)		
Business entity / buy-sell records		
Retirement / investment statements		
Bank statements		
Marriage / divorce / premarital or postmarital records		
Birth / adoption / citizenship / military records		
Appraisals / inventories of valuables		
Funeral / cemetery / prepaid arrangements		
Passwords / recovery codes / emergency access		
Other critical records		

Professional and practical contacts

Role	Name / Firm	Phone / Email	Notes
Estate planning attorney	Griswold Law Firm / Timothy A. Griswold	(512) 575-5816 / tim@griswoldlawfirm.com	
CPA / tax preparer			
Financial advisor / broker			
Insurance agent			
Banker / lending contact			
Employer HR / benefits contact			
Business attorney / accountant			
Property manager / realtor			
Other key advisor			

13. Annual Review Log and Final Notes

Review this organizer at least annually. A quick review is also worthwhile after any major life or financial change.

Review log

Date Reviewed	Reviewed By	Major Changes Made	Next Review / Follow-Up

Events that should prompt an update

- Marriage, divorce, separation, birth, adoption, or death of a beneficiary or fiduciary.
- Move to another state; purchase, sale, or refinance of real estate; or acquisition of property outside Texas.
- Opening or closing a significant financial account; retirement; major inheritance or gift; new business or sale of a business.
- Changes to beneficiary designations, insurance, safe-deposit boxes, digital accounts, password manager, devices, or crypto recovery methods.
- A major change in debt, recurring bills, professional advisors, or the location of original estate-planning documents.

General notes / information your executor, trustee, or family should know

You may attach additional pages, recent statements, account summaries, inventories, photographs, or other records rather than trying to fit everything into this form.

OPTIONAL SECURE ACCESS APPENDIX - STORE SEPARATELY

HIGHLY SENSITIVE INFORMATION

This appendix is optional. It is provided only for clients who affirmatively choose to record device PINs, passwords, or other credentials on paper. The safer default is to use a reputable password manager with emergency-access planning and use the main organizer to state where recovery information can be found.

If you complete this appendix, store it separately from the main organizer in a secure location. Do not email it, do not send it to Griswold Law Firm unless specifically requested through a secure method, and do not include crypto seed phrases or private keys here.

Device and password-manager access

Device / Account	Username / Sign-In	Password / PIN (optional)	MFA / Recovery Method	Where Device / Backup Is Kept	Notes

Critical email and account credentials

Service	Username / Email	Password (optional)	MFA / Recovery	What It Controls / Notes

Service	Username / Email	Password (optional)	MFA / Recovery	What It Controls / Notes

OPTIONAL SECURE ACCESS APPENDIX - CONTINUED

Additional credentials

Service / Account	Username / Email	Password / PIN (optional)	MFA / Recovery	Notes

Recovery information and emergency-access instructions

Do not record Social Security numbers, credit-card security codes (CVV), crypto seed phrases, or private keys in this appendix.