Checking and Savings Accounts

Registration	Account Title	Bank Name	Account Number	Beneficiary Name	Beneficiary Phone	Account Value	Bypass Probate
Joint Account wit...	Household checking	Sample Community ...	***4417	Jamie Sample	(555) 010-0002	$18,500.00	✓
Individual	Emergency savings	Sample Community ...	***8820	N/A	N/A	$42,000.00	✗

Taxable Investments Accounts

Registration	Account Title	Firm Name	Account Number	Advisor Name	Advisor Phone	Beneficiary Name	Beneficiary Phone	Account Value	Bypass Probate
Individual –...	Brokerage ac...	Sample Broke...	****2291	Taylor Advisor	(555) 010-0100	Jamie Sample	(555) 010-0002	$265,000.00	✓
Individual	Older broker...	Sample Secur...	****7703	Taylor Advisor	(555) 010-0100	N/A	N/A	$31,200.00	✗

Retirement Accounts

Registration	Account Title	Firm Name	Account Number	Advisor Name	Advisor Phone	Beneficiary Name	Beneficiary Phone	Account Value	Bypass Probate
401(k) Plan	Employer 401(k)	Sample Retir...	***5566			Jamie Sample	(555) 010-0002	$410,000.00	✓
Roth IRA	Roth IRA	Sample Broke...	***1148	Taylor Advisor	(555) 010-0100	Jamie Sample	(555) 010-0002	$88,000.00	✓

Account for Minors

Registration	Account Title	Firm Name	Account Number	Advisor Name	Advisor Phone	Beneficiary Name	Beneficiary Phone	Account Value	Bypass Probate
529	College savings	Sample 52...	*****3310			Riley Sample	(555) 010-0003	$46,500.00	✓

Real Assets

Subtype	Description	Value	Debt/Mortgage	Registration	Bypass Probate
Primary Residence	Family home	$650,000.00	$285,000.00	Tenants by t...	✓
Automobiles (Clas...	Sedan	$22,000.00		Individual	✗

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Insurance Policies

Type	Policy Title	Company	Policy Number	Agent Name	Agent Phone	Beneficiary Name	Beneficiary Phone	Cash Value	Death Benefit	Bypass
Term Life	Term life...	Sample Li...	**9034	Taylor Ad...	(555) 010-0100	Jamie Sample	(555) 010-0002	$0.00	$500,000.00	✓

Important Legal Documents

Document Type	Document Title	Document Location	Attorney/CPA Name	Attorney/CPA Phone	Executor/Trustee Name	Executor/Trustee Phone
Last Will and T...	Will, signed 2024	Home safe, office	Casey Attorney,...	(555) 010-0200	Sample Law Office	
Durable Power o...	Durable POA	Home safe, office	Casey Attorney,...	(555) 010-0200	Sample Law Office	

Third Executor

Third Executor	Third Executor Name	Third Executor Email	Third Executor Phone
	Morgan Sample	morgan@example.com	(555) 010-0004

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