



## In Trust Legal

Legal Document Assistance

Affordable Legal Documents and Mobile Notary Public

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InTrustLegal.com

### SCHEDULE A

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

SSN: \_\_\_\_\_

SSN: \_\_\_\_\_

CDL: \_\_\_\_\_

CDL: \_\_\_\_\_

Full Name: \_\_\_\_\_

### REAL ESTATE

Address of Primary Residence: \_\_\_\_\_

Assessor Parcel Number: \_\_\_\_\_

Additional Property Address(es):

*Include street address and APN*

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### LIFE INSURANCE POLICIES

Account Holder: \_\_\_\_\_

Account Holder: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

( \_\_\_\_\_ %) 3. \_\_\_\_\_

Beneficiaries:

Account Number: \_\_\_\_\_

( \_\_\_\_\_ %) 1. \_\_\_\_\_

Beneficiaries:

( \_\_\_\_\_ %) 2. \_\_\_\_\_

( \_\_\_\_\_ %) 1. \_\_\_\_\_

( \_\_\_\_\_ %) 2. \_\_\_\_\_  
( \_\_\_\_\_ %) 3. \_\_\_\_\_

## **BANK ACCOUNTS**

Account Holder: \_\_\_\_\_  
Bank Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

Account Holder: \_\_\_\_\_  
Bank Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

Account Type: \_\_\_\_\_  
Account #: \_\_\_\_\_

## **401(K) OR OTHER RETIREMENT ACCOUNTS**

Institution Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Institution Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Account Holder's Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
Beneficiaries:  
( \_\_\_\_\_ %) 1. \_\_\_\_\_  
( \_\_\_\_\_ %) 2. \_\_\_\_\_  
( \_\_\_\_\_ %) 3. \_\_\_\_\_

Account Holder's Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
Beneficiaries:  
( \_\_\_\_\_ %) 1. \_\_\_\_\_  
( \_\_\_\_\_ %) 2. \_\_\_\_\_  
( \_\_\_\_\_ %) 3. \_\_\_\_\_

## **INVESTMENTS (IRA'S, ROTH IRA, REITS, PARTNERSHIPS, ETC.)**

Institution Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Institution Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Account Holder's Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
Beneficiaries:  
( \_\_\_\_\_ %) 1. \_\_\_\_\_  
( \_\_\_\_\_ %) 2. \_\_\_\_\_  
( \_\_\_\_\_ %) 3. \_\_\_\_\_

Account Holder's Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
Beneficiaries:  
( \_\_\_\_\_ %) 1. \_\_\_\_\_  
( \_\_\_\_\_ %) 2. \_\_\_\_\_  
( \_\_\_\_\_ %) 3. \_\_\_\_\_

## SAFE DEPOSIT BOX

Bank Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Contents:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

## AUTOMOBILES

Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

VIN: \_\_\_\_\_

Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

VIN: \_\_\_\_\_

Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

VIN: \_\_\_\_\_

Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

VIN: \_\_\_\_\_

## GIFT BEQUESTS

List specific property that you want to gift to someone:

1. \_\_\_\_\_ goes to \_\_\_\_\_  
NAME AND ADDRESS

2. \_\_\_\_\_ goes to \_\_\_\_\_  
NAME AND ADDRESS

3. \_\_\_\_\_ goes to \_\_\_\_\_  
NAME AND ADDRESS

4. \_\_\_\_\_ goes to \_\_\_\_\_  
NAME AND ADDRESS

5. \_\_\_\_\_ goes to \_\_\_\_\_  
NAME AND ADDRESS