
Stock Yards
WEALTH MANAGEMENT & TRUST
Tying Up Loose Ends
Record of Personal Affairs
Louisville
4441 Springdale Road
Louisville, KY 40241
(502) 625-1005
Lexington
360 E. Vine Street
Lexington, KY 40507
(859) 765-8242
Cincinnati
101 W. Fourth Street
Cincinnati, OH 45202
(513) 824-6117
Indianapolis
11450 N. Meridian Street
Carmel, IN 46032
(317) 238-2844

Notes

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Quick Reference Records

NAME

ADDRESS

CITY, STATE, ZIP

PHONE NUMBER

MEDICAL HISTORY

BLOOD TYPE

ALLERGIES

PENICILLIN

OTHER

DIABETIC

TETANUS

LAST TETANUS TOXOID VACCINATION, IF ANY

IN CASE OF EMERGENCY, PLEASE NOTIFY

NAME

RELATIONSHIP

PHONE

ADDRESS

CITY, STATE, ZIP

SAFE DEPOSIT BOX

NAME OF BANK

ADDRESS

TELEPHONE

IN WHOSE NAME

BOX NUMBER

LOCATION OF KEY

Important Documents

BIRTH CERTIFICATE

LOCATION

PASSPORT

LOCATION

DIVORCE

LOCATION OF PAPERS (IF APPLICABLE)

SOCIAL SECURITY CARD

LOCATION

MARRIAGE CERTIFICATE

LOCATION

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Record Of Vital Statistics

Information needed for death certificate.

FULL LEGAL NAME

NICKNAME

MAIDEN NAME (IF APPLICABLE)

OTHER NAMES (IF APPLICABLE)

RACE

CITIZEN OF HISPANIC ORIGIN? ❑ YES ❑ NO

(IF YES SPECIFY)

BIRTH DATE

BIRTHPLACE

EDUCATION:

0-12, # OF YRS

COLLEGE # OF YRS

SOCIAL SECURITY #

OCCUPATION

EMPLOYED BY

LOCATION: CITY STATE

DATE OF RETIREMENT

IF A VETERAN, DATE(S) OF SERVICE

LEGAL ADDRESS

CITY

STATE

MAILING ADDRESS (IF DIFFERENT)

CITY

STATE

❑ SINGLE ❑ MARRIED

❑ WIDOWED ❑ DIVORCED

NAME OF SPOUSE

(MAIDEN NAME, IF APPLICABLE)

DATE MARRIED

PLACE MARRIED

IF SPOUSE IS DECEASED, DATE

PLACE OF DEATH

MOTHER'S MAIDEN NAME

PLACE OF RESIDENCE

FATHER'S NAME PLACE OF RESIDENCE

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Estate Planning/Wills

Estate planning, documenting your wishes, and protecting your loved ones is vitally important. The estate planning process begins with a Will. A Will allows you to articulate your desires for the distribution of your assets and earthly possessions upon your passing.

One of the most important aspects of drafting a Will is the appointment of an executor. The executor should be someone who is trustworthy and will use sound judgment in settling your affairs. The named executor must file the will with the Probate Court within the time prescribed by statute, then proceed with the distribution of assets of the estate according to the provisions the deceased has prescribed. Settling an estate can be a long, complicated process, and placing this burden on a loved one can be overwhelming. Please consider naming a professional, unbiased corporate fiduciary, such as Stock Yards Bank & Trust, to serve as executor, co-executor, or agent for executor.

In addition to a Will, a complete estate plan should include a power of attorney, Living Will, and health care surrogate designation and they may require a trust. Estate planning also contemplates disability, asset protection, and health care planning. Due to changing tax laws and family circumstances, it is important to review estate planning documents at least every three to five years. Our estate planning specialists can guide you through this complex process to ensure you and your loved ones are properly protected.

WILLS/TRUST

LOCATION OF ORIGINAL

LOCATION OF COPIES

DATE OF WILL

ATTORNEY WHO PREPARED

NAME

ADDRESS

TELEPHONE

EMAIL

TRUST ❑ YES ❑ NO

HEALTHCARE SURROGATE/LIVING WILL

❑ YES ❑ NO

LOCATION OF ORIGINAL

LOCATION OF COPIES

POWER OF ATTORNEY

NAME

ADDRESS

TELEPHONE

EMAIL

If no will exists but there are remaining assets, an administrator is appointed by a surrogate or judge to distribute the assets. This means that your assets will be distributed according to state statutes, regardless of your wishes.

IF THERE IS NO WILL, MY DESIRED ADMINISTRATOR IS:

NAME

ADDRESS

TELEPHONE

EMAIL

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Record Of Healthcare Providers

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DENTIST

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

DOCTOR

NAME

ADDRESS

TELEPHONE

EMAIL

Financial Planning

Financial Planning can mean different things to different people. While having a financial plan is important during your life, it is also extremely important after your passing. A well-documented, written financial plan will list assets, liabilities, income, and expenses. All of these financial items need to be addressed by the executor of your estate, and consequently, will directly affect your loved ones. Keeping a comprehensive, written financial plan with your estate planning documents can be very helpful for your executor.

RECORD OF PROFESSIONAL ADVISORS

ATTORNEY

NAME

ADDRESS

TELEPHONE

EMAIL

CPA/ACCOUNTANT

NAME

ADDRESS

TELEPHONE

EMAIL

STOCKBROKER

NAME

ADDRESS

TELEPHONE

EMAIL

BANKER

NAME

ADDRESS

TELEPHONE

EMAIL

PRIEST/MINISTER/SPIRITUAL ADVISOR

NAME

ADDRESS

TELEPHONE

EMAIL

INSURANCE AGENT

NAME

ADDRESS

TELEPHONE

EMAIL

FINANCIAL ADVISOR

NAME

ADDRESS

TELEPHONE

EMAIL

Record Of Financial Affairs

BANK ACCOUNT

BANK NAME

ADDRESS

ACCOUNT TYPE

ACCOUNT NUMBER

NAME(S) ON ACCOUNT

BANK ACCOUNT

BANK NAME

ADDRESS

ACCOUNT TYPE

ACCOUNT NUMBER

NAME(S) ON ACCOUNT

BANK ACCOUNT

BANK NAME

ADDRESS

ACCOUNT TYPE

ACCOUNT NUMBER

NAME(S) ON ACCOUNT

DEBT

LENDER

DESCRIPTION

LOAN NUMBER

DEBT

LENDER

DESCRIPTION

LOAN NUMBER

CREDIT CARD

PHONE #

ISSUER

ACCOUNT NUMBER

CREDIT CARD

PHONE #

ISSUER

ACCOUNT NUMBER

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Record Of Financial Affairs

PENSION OR UNION PLAN

NAME OF COMPANY

ADDRESS

ACCOUNT NUMBER

LOCATION

401K/IRA & RETIREMENT PLAN BENEFITS

NAME OF COMPANY

ACCOUNT NUMBER

CONTACT INFORMATION

STOCK & BOND CERTIFICATES

LOCATION

ADDITIONAL INFO/CONTACTS

INVESTMENT ACCOUNT

NAME OF COMPANY

ACCOUNT NUMBER

CONTACT INFORMATION

PROPERTY OWNED

LOCATION

DEED BOOK/PAGE #

MORTGAGE COMPANY

TITLE IN NAME OF

APPRAISAL VALUE/DATE

PENSION OR UNION PLAN

NAME OF COMPANY

ADDRESS

ACCOUNT NUMBER

LOCATION

401K/IRA & RETIREMENT PLAN BENEFITS

NAME OF COMPANY

ACCOUNT NUMBER

CONTACT INFORMATION

STOCK & BOND CERTIFICATES

LOCATION

ADDITIONAL INFO/CONTACTS

INVESTMENT ACCOUNT

NAME OF COMPANY

ACCOUNT NUMBER

CONTACT INFORMATION

PROPERTY OWNED

LOCATION

DEED BOOK/PAGE #

MORTGAGE COMPANY

TITLE IN NAME OF

APPRAISAL VALUE/DATE

Record Of Financial Affairs

MISCELLANEOUS PERSONAL PROPERTY (JEWELRY, ART, FURNITURE, ETC.)

AUTOMOBILE

YEAR

MAKE/MODEL

VIN #

LIENHOLDER (IF FINANCED)

OTHER LIABILITY

BORROWER(S)

LENDER NAME/ADDRESS

LOAN NUMBER

LOAN TYPE

COLLATERAL

AUTOMOBILE

YEAR

MAKE/MODEL

VIN #

LIENHOLDER (IF FINANCED)

AUTOMOBILE

YEAR

MAKE/MODEL

VIN #

LIENHOLDER (IF FINANCED)

INCOME TAX RETURNS

LOCATION

OTHER LIABILITY

BORROWER(S)

LENDER NAME/ADDRESS

LOAN NUMBER

LOAN TYPE

COLLATERAL

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Life Insurance

As we go through life, we often forget to review insurance purchased years ago. You may have obtained a term policy for any number of reasons; however your needs change over time. It may now be more prudent to plan for long term care needs than replacing lost income or paying for your child's education or wedding expenses in the event of your passing. It is important to review your life insurance coverage periodically to ensure it is evolving with you. Stock Yards Bank & Trust can assist with these reviews to be sure your coverage continues to meet your needs. Let us help give you peace of mind to know that, should something happen to you, your loved ones are protected.

LIFE INSURANCE

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

LIFE INSURANCE

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

HOMEOWNERS INSURANCE

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

CAR INSURANCE

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

OTHER INSURANCE (UMBRELLA POLICY)

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

OTHER INSURANCE

NAME OF COMPANY

AMOUNT

BENEFICIARY

LOCATION OF POLICY

AGENT NAME & CONTACT INFO

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Funeral Arrangements

FUNERAL HOME TO BE CONTACTED

FUNERAL HOME NAME

ADDRESS

TELEPHONE

PRE-ARRANGED FUNERAL MADE

PRE-ARRANGEMENT CONTRACT

LOCATION OF CONTRACT

CREMATION

DESIRED LOCATION OF DISPOSITION OF ASHES

FUNERAL SERVICE TO BE HELD

CHURCH/SYNAGOGUE

FUNERAL HOME

OTHER

LODGE OR MILITARY SERVICE

CONTACT NAME

OTHER PERSONAL REQUESTS

CONTACT NAME

OBITUARY

LOCATION (IF PRE-WRITTEN)

ADDITIONAL INFO/CONTACTS

CEMETERY

NAME OF CEMETERY DESIRED

ADDRESS

TELEPHONE

PLOT IN WHOSE NAME

PLOT NUMBER

SECTION

BLOCK

LOCATION OF DEED

PRESIDING OFFICIAL

NAME

ADDRESS

TELEPHONE

MUSIC

SCRIPTURE/READING SELECTIONS

CLOTHING

VISITATION - CALLING HOURS

PALLBEARERS

FLOWERS ❑ YES ❑ NO

MEMORIAL DONATIONS ❑ YES ❑ NO

NAME OF CHARITY

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Biographical Information

HIGH SCHOOL

SCHOOL NAME

DATES

GRADUATION DATE

COLLEGE

SCHOOL NAME

DATES

GRADUATION DATE

DEGREE

COLLEGE

SCHOOL NAME

DATES

GRADUATION DATE

DEGREE

OTHER EDUCATION

OTHER NAME

DATES

MILITARY SERVICE RECORD

BRANCH OF SERVICE

RANK

DATES OF SERVICE

MILITARY ID NUMBER

RELIGIOUS AFFILIATION OR MEMBERSHIP

EMPLOYMENT

EMPLOYER

POSITION HELD

DATES

EMPLOYMENT

EMPLOYER

POSITION HELD

DATES

EMPLOYMENT

EMPLOYER

POSITION HELD

DATES

RETIRED DATE

FRATERNAL, SERVICE, SOCIAL OR UNION

MEMBER OF

MEMBER OF

MEMBER OF

FRATERNAL JEWELRY (OR OTHER ORG.)

LOCATION OF JEWELRY

POLITICAL ORGANIZATIONS

POLITICAL POSITIONS HELD

OTHER BOARDS SERVED ON

CLUB, ASSOC., MEMBERSHIPS, ETC.

SPECIAL RECOGNITIONS

ATHLETIC, POLITICAL, RELIGIOUS, SCIENTIFIC

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Veteran's Service & Family Records

FULL NAME OF VETERAN

PENSION OR V.A. CLAIM NO.

SERVICE SERIAL NC.

DATE ENTERED SERVICE

PLACE ENTERED SERVICE

PLACE OF ENTRY

STATE OF RESIDENCE AT TIME

BRANCH OF SERVICE

GRADE OR RANK

NAME OF ORGANIZATION

CO. - REG. - DIV.

NAME OF WAR OR CONFLICT

DATE OF DISCHARGE

PLACE OF DISCHARGE

DECORATIONS

MEDAL OF HONOR RECIPIENT ❑ YES ❑ NO

FLAG REQUEST

❑ DRAPED ON CASKET ❑ NOT DRAPED

VETERANS CEMETERY MARKER ❑ YES ❑ NO

TYPE OF MARKER

❑ UPRIGHT MARBLE ❑ FLAT MARBLE

❑ FLAT GRANITE ❑ FLAT BRONZE

ADDITIONAL MILITARY INFORMATION

ADDITIONAL INFO/CONTACTS

RELATIVE/FRIEND

NAME

BIRTHDATE

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND

NAME

BIRTHDATE

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND

NAME

BIRTHDATE

ADDRESS

PHONE/EMAIL

LOCATION OF BIRTH CERT. OR ADOPTION PAPERS

CHILD

NAME

BIRTHDATE

ADDRESS

PHONE/EMAIL

CHILD

NAME

BIRTHDATE

ADDRESS

PHONE/EMAIL

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Relatives & Friends To Notify

RELATIVE/FRIEND:

NAME

RELATIONSHIP

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND:

NAME

RELATIONSHIP

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND:

NAME

RELATIONSHIP

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND:

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PHONE/EMAIL

RELATIVE/FRIEND:

NAME

RELATIONSHIP

ADDRESS

PHONE/EMAIL

RELATIVE/FRIEND:

NAME

RELATIONSHIP

ADDRESS

PHONE/EMAIL

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Digital Information/Logins & Passwords

KEEP THIS IN A SECURE & SAFE LOCATION

	USERNAME	PASSWORD
COMPUTER		
PHONE/TABLET		
ONLINE BANKING		
INVESTMENT WEBSITE		
FACEBOOK		
TWITTER		
INSTAGRAM		
LINKEDIN		
EMAIL		
iCLOUD		
OTHER		
OTHER		
OTHER		
OTHER		
OTHER		

Tying Up Loose Ends Checklist

Record all pages in this book which apply - check when completed

- ❑ DISCUSS CONTENTS OF BOOK WITH FAMILY _____
- ❑ DISCUSS FUNERAL ARRANGEMENTS _____
- ❑ CEMETERY - PLOT PURCHASE _____
- ❑ MONUMENT DEALER _____
- ❑ FUNERAL HOME _____
- ❑ ATTORNEY - WILL OR UPDATING ORIGINAL _____
- ❑ EXECUTOR OF ESTATE _____
- ❑ ACCOUNTANT / FINANCIAL INFORMATION _____
- ❑ SOCIAL SECURITY ADMINISTRATION _____
- ❑ VETERANS SERVICE RECORD _____
- ❑ PENSION / RETIREMENT PLANS _____
- ❑ AUTOMOBILE REGISTRATIONS _____
- ❑ LIFE INSURANCE POLICIES/ UPDATES _____
- ❑ STOCK BROKER _____
- ❑ SAFE DEPOSIT BOX INSPECTION _____
- ❑ BIOGRAPHICAL INFORMATION _____
- ❑ FAMILY RECORDS _____

NOTES:

Notes

Investment and Insurance Products are:

- Not FDIC Insured
- May Lose Value
- No Bank Guarantee
- Not a Deposit
- Not Insured By Any Federal Government Agency

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