

Summary Records



Real Estate Records (Include Cemetery Plots)					
Location	Date of Purchase	Price	In Whose Name(s)	Contact Information	Where Deed is Recorded

Mutual Funds						
Name of Company	Number of Shares	Purchase Price	Date of Purchase	In Whose Name(s)	Address	Phone #

Individual Stocks/Bonds				
Name of Company	Number of Shares	Purchase Price	Date of Purchase	In Whose Name(s)

Utah State University is an affirmative action/equal opportunity institution

Other Investments				
Name of Company	Number of Shares	Serial Number Certificates	Purchase Price	In Whose Name(s)

Money Owed To The Family (Including mortgages)				
Type of Debt	Owed To	Total Owed	Amount	Where Record's Kept

Retirement/Pension/Individual Retirement Accounts (IRAs)					
Employer/Type Plan	Company	Address	Phone Number	Account Number	Where Record's Kept

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WILLS			
Date of Latest Will	Location	Executor	Attorney

TRUSTS			
Trust & Location	Trustee Name	Trustee Address	Beneficiary

ACCOUNTS AT FINANCIAL INSTITUTIONS			
Type of Account (Checking, Savings, etc.)	Name & Address of Institution	Account Number	In Whose Name(s)

SAFE DEPOSIT BOX(ES)				
Location of Box	Address	Box Number	In Whose Name(s)	Location of Key