



Confidential

Report Date: Thursday, Jul. 15, 2010 at 10:32 PM

Prepared for:

Mr. John R. Doe Jr.

Dear Trustee:

The following information has been trusted to you by the above client. This information is personal in nature and extremely confidential. The information has been provided to you for use in the event that the above client is incapacitated or otherwise unable to relay this information personally. Please use the information appropriately as needed or forward this information to the appropriate persons.

Sincere Thanks,

Maurice Holt
Rest Easy® Founder

Legal Information

Legal Name: Mr. John R. Doe Jr.

Maiden Name: Doris

Address:

111 Lake Dr
Suite 100
Cypress, TX, 77433

Phone: (222)333-4444

Alternate: (323)447-5566

Social Security: 333-44-5555

Birth Date: 08/11/1971

Birth Place: AL

Country: US

License: 1231231/TX

Religion: Baptist

Donor: Yes

Contacts

Relatives

Relative Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Cousin

Family

Family Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Dad

Financial Consultant

Financial Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Finance

Legal Counsel

Legal Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Consul

Important People

Important Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Important

People to Contact

People Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Person

Organizations

Organization Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Organizer

Physical Addresses

Physical Contact

333 West

Phone: (123)234-4455

Alternate: (444)555-3322

Notes: Physician

Accounts

Bank Accounts

Investment Accounts

Retirement Accounts

Retire

Account Type: Investment

Contact: None

Card/Account No: 324

Notes:

Credit Card Accounts

Credit

Account Type: Credit Card

Contact: None

Card/Account No: 9807879

Notes: comment

Physical Accounts

Physical

Account Type: Credit Card

Contact: Physical Contact

Card/Account No: 324234

Notes:

Memberships

Member

Account Type: Membership

Contact: None

Card/Account No: w4r4

Notes:

Other Accounts

Passwords

Online Accounts

Online

Username: User

Password: Pass

Web: site

Security Code: Code

Notes: comment

Computers and Hardware

CPU

Username: User

Password: pass2

Web: site

Security Code: code2

Notes: comment

Access and Security Codes

Access

Username: user

Password: pass

Web:

Security Code:

Notes:

Items

Keys

secret

Location: wall

Type: Key

Notes: Key

Insurance Papers

Insurance

Location: File cabinet

Type: Place

Notes: Item

Auto Related Papers

Auto

Location: File cabinet

Type: Place

Notes: Item

Burial Papers

Burial

Location: File cabinet

Type: Place

Notes: Item

Investment Papers

Investment

Location: File cabinet

Type: Place

Notes: Item

Property Deeds

Property

Location: File cabinet

Type: Place

Notes: Item

Safes and Secret Places

Safe

Location: Wall

Type: Place

Notes: Item

Legal Papers

Legal

Location: File cabinet

Type: Place

Notes: Item

Valuables

Watch

Location: Dresser

Type: Place

Notes: Item

Business Agreements/Contracts

Contract

Location: File cabinet

Type: Place

Notes: Item

Tax Information / Bills

Tax

Location: File cabinet

Type: Place

Notes: Item

Important Papers

Passport

Location: File cabinet

Type: Place

Notes: Item

Borrowed Items

Borrowed

Location: Lawnmower

Type: Borrowed

Notes: Item

Loaned Items

Loaned

Location: Fur Coat

Type: Loaned

Notes: Item

Assets

Royalty and Investment Income

Royalty

Amount: \$56.00

Cycle: Quarterly

Account: None

Contact: Financial Contact

Notes: Book Sales

Properties

Property

Amount: \$3,555.00

Cycle: Fixed

Account: None

Contact: Financial Contact

Notes: Land

Equipment

Equipment

Amount: \$445.00

Cycle: Fixed

Account: None

Contact: Physical Contact

Notes: Equipment

Intellectual Property

Copyright

Amount: \$55,446.00

Cycle: Fixed

Account: None

Contact: Financial Contact

Notes: Logo

Timeshares

Vacation Week

Amount: \$8,000.00

Cycle: Annualy

Account: None

Contact: Financial Contact

Notes: Week 27

Valuables

Jewelry

Amount: \$12,223.00

Cycle: Fixed

Account: None

Contact: Financial Contact

Notes: Ring

Business Ventures (Partnerships)

Partnership

Amount: \$50,000.00

Cycle: Fixed

Account: None

Contact: Financial Contact

Notes: Company

Debts

Credit Cards

Capital One

Amount: (\$400.00)

Cycle: Bi-Weekly

Account: None

Contact: Physical Contact

Notes: Card

Loans

Mortgage

Amount: (\$45,666.00)

Cycle: Bi-Weekly

Account: None

Contact: Physical Contact

Notes: Loan

Insurance Premiums

Allstate

Amount: (\$34.50)

Cycle: Semi-Annually

Account: None

Contact: Physical Contact

Notes: Insurance

Maintenance/Membership Fees

Gym

Amount: (\$25.00)

Cycle: Bi-Weekly

Account: None

Contact: Physical Contact

Notes: Membership

Obligations

Charity

Amount: (\$100.00)

Cycle: Annualy

Account: None

Contact: Physical Contact

Notes: Charity

Notes

Note

Group: My Category

Notes: Just a note
