

1. What I own

From Chapter 14. One line per holding. Plain words, no account numbers, no balances.

What it is	Where it lives	Who to contact	Named beneficiary?	Where the instructions are

What am I holding for someone else? Money kept for a child, a wallet that’s really somebody else’s, a small balance left somewhere on purpose.

Copies of this page are with (at least one person who isn’t your primary heir):

Date: -----