

Insurance & Accounts Summary

Prepared by Margaret Rose Avery — fictional sample

Life Insurance

Northwestern Mutual — Policy #NM-4471892 (fictional). Primary beneficiary: Thomas Avery. Contingent: the children, equally. Agent contact and policy documents are stored in the FinalKeepSake vault.

Bank Accounts

Huntington National Bank — checking and savings. Thomas is a joint owner. Account numbers are recorded in the password notebook in the cedar box.

Retirement

Fidelity — 401(k) rollover IRA. Beneficiary designations reviewed 2025.

Property

Home at 88 Sycamore Street — paid in full, deed in the fire safe. Lake cabin — jointly held with Thomas.

Where Everything Lives

Fire safe (bedroom closet): will, deed, titles. Cedar box (top drawer): passwords, account list, personal letters. FinalKeepSake vault: scanned copies of all of the above.