Our Investment Organizer

SENIOR SOLUTIONS OF AMERICA, INC.

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Organizing Your Investments

Are your financial records in order? Are your ownership and account documents easy to find? Who are your professional advisors? What are their phone numbers?

What if you are in a serious accident tomorrow? Could someone step in and handle your daily affairs while you recovered? What if you should die tomorrow? Could your spouse or heirs easily settle your estate? Or, will they find a jumble of unorganized papers scattered throughout your house? At your attorney's or accountant's office? In your safe deposit box?

This Investment Organizer was designed to help you answer these questions. It will definitely make the job easier for anyone else who needs to manage or settle your affairs. But, more importantly, it will help you manage your own affairs more easily, with greater peace-of-mind. You'll reduce the chance of missing the maturity dates for your CDs, or the interest payment dates for your bonds.

This organizer is very comprehensive; not every page may apply to you. Don't try to complete it all at once. Relax and take your time. Remember to make changes as they occur. We recommend that you update everything at least once each year.

Professional Advisors

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Attorney:	Accountant or Tax Preparer:
Name	Name
Address	Address
Phone	Phone
Financial Planner:	Investment or Stock Broker:
Name	Name
Address	Address
Phone	Phone
Insurance Agent - Life:	Insurance Agent - Health:
Name	Name
Address	Address
Phone	Phone
Insurance Agent - Auto:	Insurance Agent - Home:
Name	Name
Address	Address
Phone	Phone
Clergy - His:	Clergy - Hers:
Name	Name
Address	Address
Phone	Phone
Other Advisor:	Other Advisor:
Name	Name
Address	Address
Phone	Phone
For	For
Other Advisor:	Other Advisor:
Name	Name
Address	Address
Phone	Phone
For	For

Maturity Date or Deadline Date	Describe CD, Investment, Stock Option, Loan, Etc.

Financial Institution	Account Number and Type	Authorized Signers
Name	January Provide American Science (1979)	
Address	-	
Phor	ne	
Location of Statement / other account inform		
Name		
Address	-	
Phor	ne	
Location of Statement / other account inform	ation	
Name		
Address	-	
Phor	ne	
Location of Statement / other account inform	ation	
Name		
Address		
Phor	ne	
Location of Statement / other account inform	ation	
Name		
Address		
Phor	ne	
Location of Statement / other account inform	ation	
Name		
Address		
Phor	ne	
Location of Statement / other account inform	ation	
Name	-	
Address		
Phor	ne	
Location of Statement / other account inform	ation	
Name		
Address		
Phor	ne	
Location of Statement / other account inform	ation	

(for CDs, see page 5)

Amount Invested	Date Purchased	Maturity Date	Interest Rate	How is Interest Paid or Reinvested	Certificate Number	Name and Address of Issuer	Owners
\$							
						Dhama	
						Phone	
\$							
						Phone	
\$							
						Phone	
\$							
						Phone	
\$							
Ů							
						Phone	
\$							
						Phone	
\$							
						Phone	

s F er An	Face mount	Purchase Price*	Date Purchased	Interest Rate	Maturity Date	Location	Owners
\$		\$					

*Including Fees or Commissions

Issuer	Face Amount	Purchase Price*	Date Purchased	Interest Rate	Tax Exempt or Taxable?	Maturity Date	Location of Bond	Owners
	\$	\$						

*Including Commissions

Amount Invested*	Type of Fund	Purchase or Start Date	Name and Address of Issuer	Account Number	Owners
\$					
			Phone		
\$					
			Phone		
\$					
			Phone		
\$					
			Phone		
\$					
			Phone		
\$					
			Phone		
\$					
			Phone		

*Including Commissions

Stock Broker				Phone		Account Number	
Company	Number of Shares	Original Price Per Share*	Date Purchased	Dividend Per Share	Certificate Serial #'s	Location of Certificates	Owners
		\$		\$			

*Including commissions

STOCK OPTIONS

Company	Number of Shares	Option Price Per Share	Date Option Granted	Date Option Expires	Location of Options	Owners
		\$				

(Single Family Home or Duplex)

Address	
Names of Owner(s)	
Date of Purchase Purchase	Price: \$
+ Title Insu	arance:
+ Recording	g Fees:
+ Attorney	y Fees:
+ Other	r Fees:
TOTAL PURCHASE PF	RICE: \$
Most recent appraised value = \$ Date of Approximation Date of	ppraisal
Mortgage Held By	Phone
Address	
Date of Mortgage Loan Number	
Annual Interest Rate% Is this Interest Rate Variable?	If YES, explain
Is this Mortgage covered by Mortgage Life and/or Disability Inst	urance?
Title Insurance Company	
Address	
Policy Number Location of Policy	
Property Taxes = \$ per year, due on	and
Paid Directly or paid in Escrow to the Mortgage Holder?	
Monthly Payment: Principal & Interest: \$	
Property Taxes: +	
Homeowner's Property Insurance: +	
Mortgage Life/Disability Insurance: +	
	due on the of each Month
Real Estate Management Firm	
Address	
Manager's Name	
RENTERS:	
1. Name(s)	Home Phone
Renter's Employer	Work Phone
Address	
MONTHLY RENT = \$, DUE ON THE	DAY OF EACH MONTH
2. Name(s)	Home Phone
Renter's Employer	
Address	
MONTHLY RENT = \$, DUE ON THE	

Business Name, Address and Phone	Type of Business	Price*/Value of Interest	Owner(s)	Percent of Ownership
		\$		
		\$		

OTHER INVESTMENTS

Include here real estate and other limited partnership interests, commodities and other types of investments not covered on other pages.

Description	Date Acquired	Price*/Value	Owner(s)
		\$	

*Including Commissions

Copyrights, Patents and Trademarks

Type (Copyright, Patent or Trademark)	Owner's Name	
Registration or ID Number	Registration Date	
Description		
Are the rights licensed to someone else?	If YES, Name	
Address	Phone	
Royalties to be received from: Name		
Address	Phone	
Payable To		
Payment Amount(s) Due \$	Due Dates	
Duration of Royalties	Are there Survivor Benefits?	
If YES, Explain		
	Owner's Name	
•	Registration Date	
1		
0	If YES, Name	
	Phone	
•		
	Phone	
Payable To		
v	Due Dates	
•	Are there Survivor Benefits?	
If YES, Explain		
Type (Copyright, Patent or Trademark)	Owner's Name	
Registration or ID Number	Registration Date	
Description	<u> </u>	
Are the rights licensed to someone else?	If YES, Name	
6	Phone	
•	Phone	
Payable To		
5	Due Dates	
	Are there Survivor Benefits?	
If YES, Explain		