

Important Documents and Financial Records

The following pages will help you organize information about important documents, personal finances and online accounts. Keep it in a safe place and let a trusted friend or family member know how to find it. In case of an emergency or at the time of your passing, these notes will help your loved ones identify and manage your affairs.



Name _____ Date _____

ADDRESS

CITY

STATE

ZIP

DATE OF BIRTH

SS#

HOME PHONE

CELL PHONE

Emergency Contact _____
NAME RELATIONSHIP

ADDRESS

CITY

STATE

ZIP

HOME PHONE

CELL PHONE

Living Will: Yes No _____
LOCATION

Medical Power of Attorney: Yes No _____
LOCATION

NAME OF DESIGNEE

TELEPHONE #

Last Will and Testament Location _____

Attorney _____
NAME ADDRESS PHONE

Funeral Plan _____
FUNERAL HOME ADDRESS PHONE

Real Estate

Primary Residence _____
LOCATION/DESCRIPTION

First Mortgage _____
BANK NAME LOAN #

Other Loans _____
BANK NAME LOAN #

Other Property _____
LOCATION/DESCRIPTION

LOANS AND OTHER INFORMATION

Insurance Policies

Medicare Yes No Medicaid Yes No

Medicare Supplement Yes No _____
COMPANY POLICY #

Health _____
COMPANY POLICY #

Primary Physician _____
NAME PHONE

Long Term Care _____
COMPANY POLICY #

Homeowner/Renter _____
COMPANY POLICY #

Personal Liability _____
COMPANY POLICY #

Life _____
COMPANY POLICY #

BENEFICIARY AMOUNT OF BENEFIT

COMPANY POLICY #

BENEFICIARY AMOUNT OF BENEFIT

COMPANY POLICY #

BENEFICIARY AMOUNT OF BENEFIT

Financial Information

Credit Cards _____
COMPANY LAST 4 DIGITS OF ACCOUNT # LOCATION

COMPANY LAST 4 DIGITS OF ACCOUNT # LOCATION

COMPANY LAST 4 DIGITS OF ACCOUNT # LOCATION

Bank Accounts _____
INSTITUTION ACCOUNT #

TYPE OF ACCOUNT NAMES ON ACCOUNT

INSTITUTION ACCOUNT #

TYPE OF ACCOUNT NAMES ON ACCOUNT

Safe Deposit Box _____
LOCATION OF BOX LOCATION OF KEY

Tax Returns/Records _____
LOCATION ACCOUNTANT PHONE #

Investments

401 (k) _____
LOCATION OF DOCUMENTS CONTACT FOR FURTHER INFORMATION

IRA Retirement Plan _____
LOCATION OF DOCUMENTS CONTACT FOR FURTHER INFORMATION

Stock & Bond Certificates _____
LOCATION OF DOCUMENTS CONTACT FOR FURTHER INFORMATION

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LOCATION OF DOCUMENTS CONTACT FOR FURTHER INFORMATION

Broker/Financial Advisors _____
COMPANY NAME PHONE #

COMPANY NAME PHONE #

Vehicles

Vehicle _____

DESCRIPTION	REG#	REG STATE
LOAN	LOCATION OF TITLE	
INSURANCE COMPANY		POLICY #

Vehicle _____

DESCRIPTION	REG#	REG STATE
LOAN	LOCATION OF TITLE	
INSURANCE COMPANY		POLICY #

Vehicle _____

DESCRIPTION	REG#	REG STATE
LOAN	LOCATION OF TITLE	
INSURANCE COMPANY		POLICY #

Online Information

Computer Login _____

USER NAME	PASSWORD
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Facebook _____

USER NAME	PASSWORD
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Twitter _____

USER NAME	PASSWORD
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Email Account _____

USER NAME	PASSWORD
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Additional Online Accounts

Company _____

WEB SITE	DESCRIPTION
USER NAME	PASSWORD

Company _____

WEB SITE	DESCRIPTION
USER NAME	PASSWORD

Other Important Documents

Birth Certificate Location _____

Marriage Certificate Location _____

Divorce Decree Location _____

Discharge Papers _____

Disability Papers Location _____

Other Documents _____

Notes
