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Financials, Property, Insurance, etc.

- This section is detailed, don't be overwhelmed.
- Begin by filling out the information you can easily find and do the rest over time.
- Ask for help from a relative, friend or financial advisor as needed.

The following individuals have my trust and are familiar with my financial situation and can be contacted for further information in these areas (e.g., a relative, financial advisor, accountant, lawyer):

NAME

TITLE OR RELATIONSHIP

INSTITUTION

ADDRESS

PHONE NUMBER

E-MAIL ADDRESS

COMMENTS

NAME

TITLE OR RELATIONSHIP

INSTITUTION

ADDRESS

PHONE NUMBER

E-MAIL ADDRESS

COMMENTS

Bank Information

Safe Deposit Box (1)

BANK

BRANCH ADDRESS

BOX NUMBER

CO-SIGNER

Safe Deposit Box (2)

BANK

BRANCH ADDRESS

BOX NUMBER

CO-SIGNER

Checking Account

BANK

BRANCH ADDRESS

BOX NUMBER

CO-SIGNER

Savings Account

BANK

BRANCH ADDRESS

BOX NUMBER

CO-SIGNER

Other Account

BANK

BRANCH ADDRESS

BOX NUMBER

CO-SIGNER

Location of my bank statements

Government related documents location

RECENT IRS TAX RETURNS

GOVERNMENT ASSISTANCE DOCUMENTS

Other

My Investments

Brokerage or Mutual Fund Accounts

INSTITUTION

ADDRESS

NAME OF BROKER

Accounts: (number, user id, password, or location of password)

My Retirement Assets

Deferred compensation

INSTITUTION

ADDRESS

PHONE

401(K) plans

INSTITUTION

ADDRESS

PHONE

Keogh plans

INSTITUTION

ADDRESS

PHONE

IRA

INSTITUTION

ADDRESS

PHONE

Pension plans

INSTITUTION

ADDRESS

PHONE

Annuities

INSTITUTION

ADDRESS

PHONE

Military retirement benefits

INSTITUTION

ADDRESS

PHONE

Royalties

INSTITUTION

ADDRESS

PHONE

Other

INSTITUTION

ADDRESS

PHONE

Outstanding Loans/Debts

	NAME OF PERSON / INSTITUTION	LOAN NUMBER	COMMENTS
Personal	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank/Institution (number, payment plan)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Credit Union Loan	<input type="text"/>	<input type="text"/>	<input type="text"/>
Finance Company	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>

Credit Cards and Online Transactions

List of Credit Cards

TYPE	NUMBER	ISSUER PHONE NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

List of internet passwords, online banking access codes, PIN numbers

INTERNET SITE	WEB ADDRESS	USER NAME	PASSWORD
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

INTERNET SITE

WEB ADDRESS

USER NAME

PASSWORD

Any automatic bill paying arrangements or electronic transfers

Insurance

TYPE

POLICY NUMBER

ISSUER NAME AND CONTACT INFO

Health

Medicare/Medicaid

Life

Long term care

Disability

TYPE

POLICY NUMBER

ISSUER NAME AND CONTACT INFO

Mortgage or loan

Homeowner's

Accident

Real Estate

Real estate deeds, location of titles and mortgages owed