

Name: _____

Social Security Number: _____

Date Completed: _____

Primary Doctor: _____

Telephone: _____

Lawyer: _____

Telephone: _____

Accountant: _____

Telephone: _____

Power of Attorney: _____

Telephone: _____

Health Care Agent: _____

Telephone: _____

Investment Broker: _____

Telephone: _____

Clergy: _____

Telephone: _____

Name of Bank: _____

Acct #: _____

Name of Bank: _____

Acct #: _____

Emergency Contact: _____

Telephone: _____

Emergency Contact: _____

Telephone: _____

Personal Information

Where Is It Kept? _____

Birth Certificate: _____

Marriage Certificate: _____

Divorce Papers: _____



ORGANIZE DOCUMENTS

Military Records:

Branch of Service:

Military ID #:

Dates of Service:

Organ Donor Card:

Passport/Citizenship Papers:

Will:

Trusts:

Safety Deposit Box:

Number:

Where are keys kept?

Insurance Information: Where Is It Kept?

Automobile:

Disability:

Homeowners:

Life:

Long-Term Care:

Health:

Other:

Financial Information: Where Is It Kept?

Automobile Title/Registration:

Bank Statements:

Bonds:

CDs:

Bank Account (Checking):

Bank Account (Savings):

Bank Account (Money Market):



ORGANIZE DOCUMENTS

401(k) Account: _____

IRAs: _____

Mortgage Information: _____

Outstanding Loans: _____

Property Deeds/Title: _____

Stock Certificates: _____

Income Tax Records: _____

Pension Records: _____

Medical Information: Where Is It Kept?

Advance Directives: _____

Do Not Resuscitate Papers: _____

Health Care Power of Attorney: _____

Living Will: _____

Final Wishes: Where Is It Kept?

Burial Arrangements: _____

Cemetery Information: _____

Funeral Home: _____