

# I. Assets

## Bank and credit union accounts

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Bank name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Investment accounts

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Other pertinent information

Retirement accounts

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Company name
Account owner
Account number
Contact person
Phone <i>area code, number</i>
Website
Primary beneficiary
Secondary beneficiary

Education accounts

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

Company name
Account type
Account number
Contact person
Phone <i>area code, number</i>
Website
Beneficiary

**Tangible property**  
(Collectibles, stock and bond certificates, real estate, automobiles, etc.)

Type of asset

Location and other important information

Type of asset

Location and other important information

Type of asset

Location and other important information

Type of asset

Location and other important information

Type of asset

Location and other important information

## II. Liabilities

### Mortgages and home equity loans

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

### Motor vehicle loans

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

### Personal loans

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Lender name
Loan number
Contact person
Phone <i>area code, number</i>
Website
Terms

Credit cards

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information

Company name
Account owner
Account number
Phone <i>area code, number</i>
Website
Other pertinent information



### III. Insurance

#### Life insurance policies

Insurance company
Policy number
Owner
Insured
Primary beneficiary
Secondary beneficiary
Contact person
Phone <i>area code, number</i>
Website
Death benefit
Policy type

Insurance company
Policy number
Owner
Insured
Primary beneficiary
Secondary beneficiary
Contact person
Phone <i>area code, number</i>
Website
Death benefit
Policy type

Insurance company
Policy number
Owner
Insured
Primary beneficiary
Secondary beneficiary
Contact person
Phone <i>area code, number</i>
Website
Death benefit
Policy type

Insurance company
Policy number
Owner
Insured
Primary beneficiary
Secondary beneficiary
Contact person
Phone <i>area code, number</i>
Website
Death benefit
Policy type

Health insurance policies

Health	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Dental	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Vision	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Long-term care	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Medicare	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Supplementary	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	
Prescription drug	Policyholder	Policy number	Company
Phone <i>area code, number</i>		Website	

Motor vehicle insurance policies

Insurance company	Insurance company
Policy number	Policy number
Contact person	Contact person
Phone <i>area code, number</i>	Phone <i>area code, number</i>
Website	Website
Insured vehicle(s) make/model or description	Insured vehicle(s) make/model or description

### Homeowners insurance policies

Insurance company	Insurance company
Policy number	Policy number
Contact person	Contact person
Phone <i>area code, number</i>	Phone <i>area code, number</i>
Website	Website
Insured property	Insured property

## IV. Other information

### Locations of important documents

Adoption papers
Birth certificates
Burial instructions
Cemetery deed
Divorce papers
Employee benefits
Loan documents
Marriage certificate
Military discharge papers
Passport
Preuptial agreement
Real estate titles and deeds
Rental property leases
Safe combination
Safe-deposit box and keys

Social Security records

Tax returns

Title insurance

Miscellaneous

Estate planning documents

Wills

Trust agreements

Power of attorney

Living will

Financial records

Insurance policies

Home

Auto

Life

Contact list

Accountant name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Attorney name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Employer name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Executor name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Insurance agent name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Investment manager name *first, middle, last*

Street

City, state, zip

Phone

Fax

E-mail

Primary physician name *first, middle, last*

Street

City, state, zip

Phone

Fax

E-mail

Trustee name *first, middle, last*

Street

City, state, zip

Phone

Fax

E-mail

Power of attorney name *first, middle, last*

Street

City, state, zip

Phone

Fax

E-mail

Health care proxy name *first, middle, last*

Street

City, state, zip

Phone

Fax

E-mail

Other contacts

Name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

Name <i>first, middle, last</i>	
Street	
City, state, zip	Phone
Fax	E-mail

## Funeral arrangements

Funeral home	
Street	
City, state, zip	
Phone	Contact person
Fax	E-mail
Special requests/instructions	



# PASSWORD DIRECTORY

<u>WEBSITE</u>	<u>EMAIL USED</u>	<u>USER ID</u>	<u>PASSWORD</u>
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