

STAY ORGANIZED

The following pages allow you to record key information about fundamental estate elements. Ensure that someone knows where the original copy of each of your important documents is stored.

NOTE: Never share, disclose or leave the following information in an area where it may be accessed by strangers or those without your given consent.

Key Documents

Last Will and Testament

Date of last Will/codicil: _____

Will location: _____

Executor/Trustee: _____ Phone number: _____

Address: _____

Co-Executor/co-Trustee: _____ Phone number: _____

Address: _____

Alternate/contingent Executor/Trustee: _____ Phone number: _____

Address: _____

Life insurance

Insurer: _____ Insurer: _____

Insured: _____ Insured: _____

Type: _____ Type: _____

Face value: _____ Face value: _____

Policy number: _____ Policy number: _____

Agent's name: _____ Agent's name: _____

Phone number: _____ Phone number: _____

Policy location: _____ Policy location: _____

Disability/Critical illness/Long-term care insurance

Insurer: _____ Insurer: _____

Insured: _____ Insured: _____

Type: _____ Type: _____

Face value: _____ Face value: _____

Policy number: _____ Policy number: _____

Agent's name: _____ Agent's name: _____

Phone number: _____ Phone number: _____

Policy location: _____ Policy location: _____

Other insurance (health, home, auto, travel, mortgage, other)

Insurer: _____	Insurer: _____
Insured: _____	Insured: _____
Type: _____	Type: _____
Policy number: _____	Policy number: _____
Coverage amount: _____	Coverage amount: _____
Insurer contact number: _____	Insurer contact number: _____
Policy location: _____	Policy location: _____

Location of other important documents

Your birth certificate: _____

Spouse/partner's birth certificate: _____

Children's birth certificates: _____

Marriage certificate: _____

Citizenship and passports: _____

Medical records: _____

Income tax returns: _____

Banking records: _____

Investment records: _____

Loans/mortgage records: _____

Vehicle ownership records: _____

Separation/divorce papers: _____

Marriage/cohabitation/separation agreement: _____

Custody/adoption records: _____

Other (specify): _____

Utilities and Service Providers

Electricity provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Cable/Satellite provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Oil/gas company: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Security system provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Telephone/long distance provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Cellular phone service provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Internet service provider: _____

Account number: _____

Phone number: _____

Website: _____

Online user ID/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Email addresses:

Email address: _____

Online user ID/password: _____

Email address: _____

Online user ID/password: _____

Email address: _____

Online user ID/password: _____

Newspaper subscription: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Yard: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Social Networking: _____

Website: _____

Online username/id: _____

Password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Club memberships: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Landlord: _____

Phone number: _____

Parking space number(s): _____

Magazine subscriptions: _____

Membership number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Snow removal provider: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Social Networking: _____

Website: _____

Online username/id: _____

Password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Other: _____

Account number: _____

Phone number: _____

Website: _____

Online userid/password: _____

☐ Preauthorized payment from account no.: _____

☐ Payment required upon receipt

Condominium Association: _____

Phone number: _____

Parking space number(s): _____

Bank account information

Name of financial institution: _____

Address: _____

Phone number: _____

Website: _____

Online banking user ID/password: _____

Account number	Account type/PIN	Ownership (individual, joint)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Name of financial institution: _____

Address: _____

Phone number: _____

Website: _____

Online banking user ID/password: _____

Account number	Account type/PIN	Ownership (individual, joint)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Loan and credit line information

Company: _____

Address: _____

Contact name: _____

Phone number: _____

Borrower: _____

Details: _____

Company: _____

Address: _____

Contact name: _____

Phone number: _____

Borrower: _____

Details: _____

Credit cards

Company: _____ Company: _____

Name on card: _____ Name on card: _____

Card number: _____ exp.: _____ Card number: _____ exp.: _____

Website: _____ Website: _____

Online userid/password: _____ Online userid/password: _____

Company: _____ Company: _____

Name on card: _____ Name on card: _____

Card number: _____ exp.: _____ Card number: _____ exp.: _____

Website: _____ Website: _____

Online userid/password: _____ Online userid/password: _____

Investment accounts (cash account, margin account, locked-in accounts, annuities, etc.)

Firm: _____

Website: _____

Online banking user ID/password: _____

Account type	Account number/PIN	Ownership (individual, joint)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Firm: _____

Website: _____

Online banking user ID/password: _____

Account type	Account number/PIN	Ownership (individual, joint)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Firm: _____

Website: _____

Online banking user ID/password: _____

Account type	Account number/PIN	Ownership (individual, joint)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other investments (i.e. bonds, term deposits, share certificates)

Item description	Location
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Pension plans (IRA, 401(k), Roth Plan, HR 10, SERP/457(f), 403(b))

Company name: _____ Company name: _____

Phone number: _____ Phone number: _____

Employee/plan number: _____ Employee/plan number: _____

Company name: _____ Company name: _____

Phone number: _____ Phone number: _____

Employee/plan number: _____ Employee/plan number: _____

Annuities

Issuing company: _____ Issuing company: _____

Phone number: _____ Phone number: _____

Policy number: _____ Policy number: _____

Policy location: _____ Policy location: _____

Personal assets (i.e. cars, art, jewelry, coin collection, etc.)

Item	Location
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Real estate

Principal residence

Address: _____

Purchase date: _____

Purchase price: _____

Owner(s): _____

Deed location: _____

Mortgage

Company: _____

Address: _____

Phone number: _____

Reference number: _____

Location of mortgage document: _____

Property tax information

Property identifier number: _____

Municipality: _____

Phone number: _____

Location of rental agent (where applicable) _____

Other property

Address: _____

Purchase date: _____

Purchase price: _____

Owner(s): _____

Deed location: _____

Mortgage

Company: _____

Address: _____

Phone number: _____

Reference number: _____

Location of mortgage document: _____

Property tax information

Property identifier number: _____

Municipality: _____

Phone number: _____

Location of rental agent (where applicable) _____

Corporate interest

Company name: _____ EIN: _____

Sole proprietor/partnership/corporation: _____

Location of key documents (i.e. shareholder, buy/sell agreements): _____

Company name: _____ EIN: _____

Sole proprietor/partnership/corporation: _____

Location of key documents (i.e. shareholder, buy/sell agreements): _____