

1. Personal Information & Documents

Family Member	Date of Birth	Social Security Number

Document	Location
Birth certificate	
Marriage license	
Passport	
Vaccination records	
Military discharge papers	
Divorce decree	
Power of Attorney	
Other	

2. Safe Deposit Boxes

Depository Address	Owner	Person with Power of Attorney	Contents
Box #1			
Box #2			

3. Bank Accounts

Bank Name	Account Type	Account Number	Location of Bank Records

4. Investments

Type (Stock, Bond, Mutual Fund, etc.)	Account Number	Number of Shares	Location of Account Statements

5. Employee Savings, Retirement or Stock Plans

Employer	Type of Plan	Value	Date of Valuation	Beneficiary

6. Real Estate Records

Property Address & Description	Location of Deed	Location of Property Tax Receipts	Name/Address of Mortgage Lender

7. Children's Accounts and Trusts

Child's Name	Type of Account or Trust	Where Funds Are Invested	Name & Address of Custodian or Trustee	Value

8. Life Insurance

Insurance Company	Policy #	Face Value	Beneficiaries	Location of Policy

9. Health Insurance

Insurance Company	Policy #	Type of Coverage	Location of Policy

10. Casualty Insurance (Homeowner's or Renter's, Auto, etc.)

Insurance Company	Policy #	Type of Coverage	Policy Limits	Agent & Phone

11. Income Tax Records

Return & Documents	Location
Current Year	
Last Year	
Prior Years	

12. Credit Cards and Loans

Type of Card or Loan	Issuer or Lender	Account Number	Location of Statements

13. Will

Attorney Name, Address & Phone Number	Executor Name, Address & Phone Number	Location of Will

14. Burial Plot

Cemetery	Location of Deed and Burial Instructions

15. Advisers

Type	Name	Address	Phone #
Attorney			
Stockbroker			
Tax Preparer			
Life Insurance			
Agent			
Financial Planner			
Other			