



Family Record

Family Member Names	Address	Telephone Number(s)	Birth Date	Social Security No.

Important Advisors and Contacts

Advisor	Name	Telephone or Email	Advisor	Name	Telephone or Email
Attorney			Banker		
Accountant			Investments		
Personal Representative			Employer		
Power of Attorney			Life Insurance		
Primary Care Doctor			Home Insurance		
Other Doctors			Auto Insurance		
			Business Partner		
Dentist			Neighbors		
Pastor/Priest					



Property

Types	Owners	Location	Abstract Location	Date Acquired
Real Estate: Residence				
Real Estate: Business				
Real Estate: Ag Land				
Motor Vehicle (s)				
Cemetery Plot(s)				
Other				

Banking, Savings, and Investments

Types of Accounts	Owner(s)	Financial Institution	Location of Records	Account No.	Beneficiary	Approx. Value
Checking						
Saving						
Money Market						
Bonds						
Stocks, mutual funds						
Investment Trusts						
IRA, SEPS						
Retirement						
Pension						
Other						



Insurance

Type	Policy Owner(s)	Company	Location of Policy	Policy No.	Beneficiary	Approx. Value
Life						
Health						
Home						
Auto						
Renters						
Long Term Care						

Credit Accounts

Type	In Name of	Company	Account No.	If lost or stolen, notify



Debt Information

Type	Company/Person	Total Amount Owed	Payment Amount/Dates	Location of Contract/Record	Approx. Value
<i>What we owe:</i>					
<i>What others owe us:</i>					



Membership in Organizations

Name of Organization	Address of Contact	Type of Membership	Membership No.

Other Important Records

Type	Location	Additional Information
Durable Power of Attorney		
Health Records		
Tax Returns		
Passport		
Wills		
Health Care Directive		
HIPAA Release		
Funeral Plans		
Employment Records		
Appraisals		
Jewelry		
Firearms		
Inventory of Tools		
Inventory of Equipment		
Lease Agreements		
Titles and Bill of Sale		
Keys to Safe Deposit Box		
Computer passwords		