



COMPLETE LIFE INFORMATION ORGANIZER

THIS DOCUMENT IS PERSONAL AND CONFIDENTIAL

Please keep in a protected or restricted area such as your home safe, file cabinet or locked closet or box. Close family members should be given the information to access this document in case of emergency.

As necessary, please attach additional sheets to provide the most information possible. This document is for your use and should be tailored to your specific needs.

BACKGROUND INFORMATION

PIN NUMBERS / ACCESS CODES

Bank by phone _____

Bank online _____

Debit cards _____

ATM _____

Telephone voice mail _____

Cell phone _____

Property (gatehouse or guard) _____

COMPUTER & INTERNET USAGE

Computer access password _____ Co Computer access password _____

Wifi security code _____ Wir Wifi security code _____

E-mail address _____ E-2ⁿ 2nd Email: _____

E-mail access code _____ E-m _____

Important websites & passwords _____

Location of CD ROMs & flash drive backup files _____

BANKING AND INVESTMENT INFORMATION
(Additional Sheets should be attached as necessary)

PERSONAL BANK ACCOUNTS

Account name and number _____
Names on account _____
Bank _____
Telephone _____
Type of account _____
Location of account documents _____
Second signature _____
Power of attorney _____

ADDITIONAL PERSONAL BANK ACCOUNTS

Account name and number _____
Names on account _____
Bank _____
Telephone _____
Type of account _____
Location of account documents _____
Second signature _____
Power of attorney _____

AUTOMATIC BILL PAYING

Name of store and service _____
Telephone _____
Date payment deducted _____
Bank and account number _____
Name of store/service _____

PERSONAL LOAN

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Type of loan _____

Location of loan papers _____

OUTSTANDING LIEN AGAINST PROPERTY

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Location of loan papers _____

FOREIGN BANK ACCOUNT

Name(s) on account _____

Account number _____

Type of account _____

Bank _____

Location of account papers _____

COMPANY PENSION

Name on pension _____

Reference number _____

Dates of employment _____

Company name _____

Telephone _____

Location of pension papers _____

RETIREMENT ACCOUNT

Name on account _____

Account reference number _____

Type of account _____

Bank _____

Telephone _____

Location of account documents _____

INVESTMENT (NON-RETIREMENT) ACCOUNT

Name on account _____

Account reference number _____

Type of account _____

Bank _____

Telephone _____

Location of account documents _____

SAVINGS CERTIFICATE

Depositor _____

Certificate number _____

Bank _____

Telephone _____

Location of certificates _____

SAVINGS BOND

Bond held by _____

Type of bond _____

Bond series number _____

Location of bond _____

STOCK CERTIFICATE

Stockholder(s) _____

Stock name _____

Stock number _____

Broker _____

Telephone _____

Location of stock documents _____

SAFE-DEPOSIT BOX

Box holder _____

Has access to box _____

Telephone number _____

Box number _____

Bank _____

Telephone _____

Key location _____

CASH-ON-HAND

Location _____

HOME SAFE

Has access to safe _____

Telephone _____

Location of combination or key _____

ESTATE PLANNING DOCUMENTS

WILL

Will of _____

Attorney _____

Telephone _____

Location of original will papers _____

People with copies of will papers _____

TRUST

Established by _____

Trust for _____

Attorney _____

Telephone _____

Location of original trust papers _____

People with copies of trust papers _____

LIVING WILL

Will of _____

Attorney _____

Telephone _____

Location of original living will _____

People with copies of living will _____

DURABLE POWER OF ATTORNEY

Given to _____

Telephone _____

Attorney _____

Location of original document _____

People with copy of papers _____

HEALTH CARE SURROGACY

Location of original document _____

People with copies of the document _____

Agent _____

Telephone _____

FURTHER INSTRUCTIONS/PERSONAL PROPERTY MEMORANDUM

Written by _____

Location of original documents _____

Telephone _____

People with copy of documents _____

Telephone _____

FUNERAL INSTRUCTIONS / MEMORIAL SERVICES

Arranged by _____

Funeral home _____

Telephone _____

Location of instruction papers _____

People with copies of instructions _____

Telephone _____

DONOR ARRANGEMENT

Location of documentation _____

CEMETERY PLOT

Owner _____

Plot intended for _____

Cemetery _____

Plot location _____

Location of contracts _____

PERSONAL, FINANCIAL AND INSURANCE INFORMATION

SOCIAL SECURITY

Social Security number _____

Location of Social Security card _____

MILITARY DISCHARGE PAPERS

Veteran name _____

Service number _____

Discharge papers location _____

INCOME TAX FILINGS

Name of taxpayer _____

Tax identification number _____

Tax adviser _____

Telephone _____

Location of tax records _____

PASSPORT

Name on passport _____

Passport number _____

Location of passport _____

DRIVER'S LICENSE

Name on license _____

License number _____

State license issued _____

License renewal date _____

CREDIT CARDS / CHARGE ACCOUNTS

Account name _____

Account number _____

Name on account _____

Location of card _____

MEDICARE

Name _____

Number _____

Effective date _____

HEALTHCARE INSURANCE

Subscriber's name _____
Contract number _____
Group number _____
Insurance company _____
Telephone _____

LONG-TERM CARE INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

LIFE INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

ANNUITY

Name on annuity _____
Insurance company _____
Contract number _____
Location of papers _____

DISABILITY INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

HOME OWNER'S INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

REAL ESTATE INVESTMENT INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

RENTER'S INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

LIABILITY INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

VEHICLE INSURANCE

Policy holder _____
Vehicle insured _____
Vehicle registration number _____
Insurance company _____
Insurance agent _____
Telephone _____

VEHICLE

Vehicle _____
Make and model _____
Serial number _____
Where purchased _____
Name on title _____
Location of title papers _____

PERSONAL PROPERTY INSURANCE

Policy holder _____
Item insured _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

REAL ESTATE OWNERSHIP DOCUMENTS

Property address _____
Owner _____
Telephone _____
Co-owner _____
Telephone _____
Bank or mortgage company _____
Telephone _____
Location of documents _____

SUBSCRIPTIONS

Name of publication _____
Sent to _____

CLUB MEMBERSHIPS

Organization _____
Organization _____

MEMBERSHIP / SMART CARDS

Account name _____
Account number _____
Name on account _____

RELIGIOUS AFFILIATION

Place of worship _____

Address _____

Clergy person _____

Telephone _____

Documentation of special Instructions _____

RELIGIOUS RITES AND CEREMONIES

Event _____

Event date _____

Place of event _____

Records storage location _____

ITEMS IN STORAGE

Stored in name of _____

What is being stored _____

Storage company _____

Telephone _____

Location of storage documents _____

PERSONAL CONTRACTS/AGREEMENTS

Names on contract _____

Telephone _____

Nature of agreement _____

Location of paperwork _____

BIRTH RECORD

Name at birth _____

Birth date _____

Place of birth _____

Birth certificate location _____

ADOPTION PAPERS

Adoption name _____

Adopted by _____

State of adoption _____

Adoption agency _____

Telephone _____

Location of paperwork _____

NATURALIZATION PAPERS

Citizen name _____

Place of naturalization _____

Location of papers _____

MARRIAGE LICENSE

Names on license _____

Marriage date _____

State license issued _____

License location _____

DIVORCE DECREE

Names on decree _____

Divorce date _____

State divorce granted _____

Decree location _____

SCHOOL RECORDS

Student name _____

School _____

School location _____

Telephone _____

Dates attended _____

Graduation date _____

Diploma location _____

EMPLOYMENT HISTORY

Employee name _____

Dates of employment _____

Company _____

Company address _____

Telephone _____

MOTHER'S HISTORY

Mother's name at birth _____

Date of birth _____

Place of birth _____

Birth certificate location _____

Mother's name at death _____
Cause of death _____
Date of death _____
Location of death _____
Burial location _____
Death certificate location _____

FATHER'S HISTORY

Father's name at birth _____
Date of birth _____
Place of birth _____
Birth certificate location _____
Father's name at death _____
Cause of death _____
Date of death _____
Location of death _____
Burial location _____
Death certificate location _____

DEPENDENTS

Name _____
Date of birth _____
Location of birth certificate _____

GROWN CHILDREN—NO LONGER DEPENDENTS

Name _____
Date of birth _____
Address _____
City/State/Zip _____
Telephone _____

PETS

Name of pet _____
Breed _____
Date of birth _____
Sex _____
Animal hospital _____
Telephone _____
Pet Trust Information _____

HOME INVENTORY (fixtures, furniture, equipment, appliances)

Item description _____
Model number _____
Purchase price _____
Value of item today _____
Location of receipt _____
Location of warranty _____
Location of item instructions _____
Is promised to _____

PERSONAL ITEMS INVENTORY (clothes, books, photos, mementos)

Item description _____
Purchase price _____
Value of item today _____
Location of receipt _____
Is promised to _____

VALUABLES INVENTORY (collect ions, jewelry, artwork, antiques)

Item description _____
Serial number _____
Purchase price _____
Value of item today _____
Location of receipt _____
Is promised to _____

BUSINESS INFORMATION

BUSINESS BANK ACCOUNT

Bank _____
Telephone _____
Location of account documents _____
Business name on account _____
Account number _____
Type of account _____
Second signature _____
Power of attorney _____

BUSINESS LOAN

Name(s) on loan _____
Loan number _____
Type of loan _____
Bank _____
Telephone _____
Location of loan papers _____

BUSINESS SAFE

People with access to safe _____
Telephone _____
Telephone _____
Location of combination or key _____

BUSINESS INSURANCE

Name on policy _____
Policy number _____
Insurance company _____
Insurance agent _____
Telephone _____
Location of policy _____

BUSINESS SUCCESSION AGREEMENTS

Location of documents _____
Business name _____
Successor in Interest _____
Type of business _____