

# IMPORTANT PERSONAL PAPERS

This form was designed to help you organize and locate your important papers. The information will be extremely helpful to your family and friends if you die or become unable to manage your personal affairs. As with any document that contains personal information, you are encouraged to keep this form in a safe place.

Name \_\_\_\_\_

Social Security number \_\_\_\_\_

## 1. Retirement Accounts

Company	Account numbers	Beneficiaries
_____	_____	_____
_____	_____	_____

Where are the statements kept? \_\_\_\_\_

## 2. Will

Where is it? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

Who has copies? \_\_\_\_\_

When was it last updated? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

Who is the executor or executrix? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

Who is named as guardian of your children, if any? \_\_\_\_\_

## 3. Living Will

Where is it? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

Who has copies? \_\_\_\_\_

When was it last updated? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

## 4. Durable Power of Attorney for Health Care

Where is it? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

Who has copies? \_\_\_\_\_

When was it last updated? (yours) \_\_\_\_\_ (your spouse's) \_\_\_\_\_

## 5. Life Insurance

Company	Policy number	Who is covered	Beneficiaries	Agent
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Where are the policies kept? \_\_\_\_\_

## 6. Health Insurance

Company	Policy number	Who is covered	Premium	Agent
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Where are the policies kept? \_\_\_\_\_

**7. Long-Term Care Insurance**

<b>Company</b>	<b>Policy number</b>	<b>Who is covered</b>	<b>Premium</b>	<b>Agent</b>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Where are the policies kept? \_\_\_\_\_

**8. Automobile Insurance**

<b>Company</b>	<b>Policy number</b>	<b>Premium</b>	<b>Agent</b>
_____	_____	_____	_____
_____	_____	_____	_____

Where are the policies kept? \_\_\_\_\_

**9. Liability and Property Insurance**

<b>Company</b>	<b>Policy insured</b>	<b>Policy number</b>	<b>Premium</b>	<b>Agent</b>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Where are the policies kept? \_\_\_\_\_

**10. Birth Certificates**

<b>Whose</b>	<b>Where located</b>	<b>Who has copy</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**11. Marriage License**

Where is it located? \_\_\_\_\_

Where are the copies kept? \_\_\_\_\_

**12. Titles and Deeds to Property**

**House**

Where is the original? \_\_\_\_\_

Where are the copies? \_\_\_\_\_

**Car(s)**

Where is the original? \_\_\_\_\_

Where are the copies? \_\_\_\_\_

**Other property or real estate**

List individually: \_\_\_\_\_

Where is the original? \_\_\_\_\_

Where are the copies? \_\_\_\_\_

**13. Military Records**

Where are the originals? \_\_\_\_\_

Where are the copies? \_\_\_\_\_

**14. Bank Records**

Name and address of bank or other institutions	Type of account	Account number	Names on account	Location of records
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**15. Safe-Deposit Box**

Name and address of institution	Box number	Who has access	Location of keys
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**16. Valuables**

Description	Appraised value	Serial number	Location
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**17. Investments**

Type	ID number	In whose name	Location of papers
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**18. Debts**

Type	Owed to whom	Payments	Due date	Paid off when
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**19. Credit Cards and Charge Accounts**

<b>Name of card or store</b>	<b>ID number</b>	<b>If card is lost or stolen, contact</b>	<b>Card is under names of</b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**20. Tax Returns**

Where are they located? \_\_\_\_\_

**21. Names, Addresses and Phone Numbers of Professional Advisors**

<b>Name of doctors</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Name of dentists</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Name of lawyers</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Name of insurance agents</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Name of tax consultant</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____

<b>Name of accountant</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____

<b>Name of broker</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____

<b>Name of clergy</b>	<b>Address</b>	<b>Phone</b>
_____	_____	_____