



ORGANIZE DOCUMENTS

Name: _____

Social Security Number: _____

Date Completed: _____

Primary Doctor: _____

Telephone: _____

Lawyer: _____

Telephone: _____

Health Care Agent: _____

Telephone: _____

Investment Broker: _____

Telephone: _____

Clergy: _____

Telephone: _____

Name of Bank: _____

Acct #: _____

Name of Bank: _____

Acct #: _____

Emergency Contact: _____

Telephone: _____

Emergency Contact: _____

Telephone: _____



Personal Information

Where is it kept? _____

Birth Certificate: _____

Marriage Certificate: _____

Divorce Papers: _____

Military Records: _____

Branch of Service: _____

Military ID #: _____

Dates of Service: _____

Organ Donor Card: _____

Passport/Citizenship Papers: _____

Will: _____

Trusts: _____

Safety Deposit Box: _____

Number: _____

Where are keys kept?: _____

Insurance Information: Where Is It Kept?

Health: _____

Car: _____

Homeowners: _____

Life: _____

Disability: _____

Long-Term Care: _____

Other: _____



Financial Information: Where Is It Kept?

- Car Title/Registration: _____
- Bank Statements: _____
- Bonds: _____
- CDs: _____
- Bank Account (Checking): _____
- Bank Account (Savings): _____
- Bank Account (Money Market): _____
- 401K Account: _____
- IRAs: _____
- Mortgage Information: _____
- Outstanding Loans: _____
- Property Deeds/Title: _____
- Stock Certificates: _____
- Income Tax Records: _____
- Pension Records: _____

Medical Information: Where Is It Kept?

- Advance Directives: _____
- Do Not Resuscitate Papers: _____
- Health Care Power of Attorney: _____
- Living Will: _____

Final Wishes: Where Is It Kept?

- Advance Directives: _____
- Cemetery Information: _____
- Funeral Home: _____