

## Collecting vital information

Name \_\_\_\_\_

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

### Important names and phone numbers:

Clergyman \_\_\_\_\_

Attorney \_\_\_\_\_

Accountant \_\_\_\_\_

Stockbroker \_\_\_\_\_

Financial planner \_\_\_\_\_

Insurance agent \_\_\_\_\_

Relative, close friends \_\_\_\_\_

Account number and location (ie: home, safe deposit box, bank, office) of key documents

### **Estate**

Wills, letters of instruction  
for self and spouse \_\_\_\_\_

Powers of attorney \_\_\_\_\_

Special bequests \_\_\_\_\_

Burial instructions \_\_\_\_\_

Cemetery plot deeds \_\_\_\_\_

### **Financial**

Pension \_\_\_\_\_

Employment contracts \_\_\_\_\_

Partnership agreements \_\_\_\_\_

Checking accounts \_\_\_\_\_

Savings accounts \_\_\_\_\_

Bank statements \_\_\_\_\_

Canceled checks \_\_\_\_\_

Credit cards and numbers \_\_\_\_\_

CDs \_\_\_\_\_

Checkbooks \_\_\_\_\_

Savings passbooks \_\_\_\_\_

Investment securities list \_\_\_\_\_

Brokerage accounts \_\_\_\_\_

Stock certificates \_\_\_\_\_

Mutual fund shares \_\_\_\_\_

Bonds \_\_\_\_\_

Savings bonds \_\_\_\_\_

Individual retirement accounts \_\_\_\_\_

Keogh plan \_\_\_\_\_

401-k information \_\_\_\_\_

Annuity contracts \_\_\_\_\_

Stock option plan \_\_\_\_\_

## **Real estate**

Title insurance \_\_\_\_\_

Rental property information \_\_\_\_\_

Mortgages \_\_\_\_\_

Deeds \_\_\_\_\_

Other \_\_\_\_\_

**Insurance**

Life-group \_\_\_\_\_

Life-individual \_\_\_\_\_

Other death benefits \_\_\_\_\_

Property & casualty \_\_\_\_\_

Liability \_\_\_\_\_

Health \_\_\_\_\_

Dental \_\_\_\_\_

Homeowners \_\_\_\_\_

Automobile \_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Personal and family**

Trust agreements \_\_\_\_\_

Birth certificates \_\_\_\_\_

Naturalization papers \_\_\_\_\_

Adoption papers \_\_\_\_\_

Marriage certificate \_\_\_\_\_

Divorce/separation records \_\_\_\_\_

**Military records** \_\_\_\_\_

**Organizational memberships** \_\_\_\_\_

**Other** \_\_\_\_\_

**Miscellaneous:** \_\_\_\_\_

**Safe combination: home** \_\_\_\_\_

**Safe combination: business** \_\_\_\_\_

**List of valuable possessions** \_\_\_\_\_

**Auto ownership title** \_\_\_\_\_

**Boat ownership** \_\_\_\_\_

**Social security cards** \_\_\_\_\_

**Drivers license numbers** \_\_\_\_\_

**Other** \_\_\_\_\_

\_\_\_\_\_