

*Who to Contact*

Role	Name	Phone Number	Email Address
<i>Financial Advisor</i>			
<i>Attorney</i>			
<i>Accountant</i>			
<i>Funeral Director</i>			
<i>Spiritual Director</i>			
<i>Family</i>			
<i>Friends</i>			
<i>Employer</i>			
<i>Other</i>			

*Important Documents*

Types of Documents	Where Are They Located?
<i>Wills</i>	
<i>Trusts</i>	
<i>Powers of Attorney</i>	
<i>Net Worth Statement</i>	
<i>Real Estate Deeds</i>	
<i>Marriage Certificate</i>	
<i>Tax Returns</i>	
<i>Safe Deposit Box</i>	
- Which Bank? Where is the key?	
<i>Car Title</i>	
<i>Military Records</i>	
<i>Loan Documents</i>	
<i>Prepaid Funeral Paperwork</i>	
<i>Social Security Cards/Numbers</i>	

*Insurance Policies*

Company	Location	Approx. Value	Beneficiaries

*Company Benefits*

Type	Contact	Approx. Value	Online Access URL	User ID / Password
<i>Stock Options</i>				
<i>Restricted Stock</i>				
<i>Deferred Comp</i>				

*Accounts / Taxable*

Type	Locations	Account Number	Approx. Value	Online Access URL	User ID / Password
<i>Brokerage</i>					
<i>Checking</i>					
<i>CDs</i>					

*Accounts / Retirement*

Type	Locations	Account Number	Approx. Value	Beneficiary	Online Access URL	User ID / Password
<i>IRA</i>						
<i>401(k)</i>						
<i>Annuity</i>						

*Accounts / Kids*

Type	Locations	Account Number	Approx. Value	Online Access URL	User ID / Password
<i>529</i>					
<i>UTMA/UGMA</i>					

### *Important User Accounts*

Name	Website	User Name	Password	Security Q&A	Instructions
<i>Computer(s)</i>					
<i>Phone(s)</i>					
<i>Tablet(s)</i>					
<i>Email Account(s)</i>					
<i>LinkedIn</i>					
<i>Facebook</i>					
<i>Twitter</i>					
<i>iTunes</i>					
<i>Amazon</i>					
<i>Kindle</i>					
<i>Google</i>					
<i>Credit Card(s)</i>					
<i>Photo Archive(s)</i>					
<i>Personal Website(s)</i>					
<i>Personal Blog(s)</i>					
<i>Online Bills</i>					
<i>Auto Payments</i>					
<i>Direct Deposits</i>					
<i>Memberships</i>					
<i>Subscriptions</i>					
<i>Financial Services</i>					
<i>Other</i>					

