

**Personal Files for:**

**Date:**

**1) PERSONAL INFORMATION**

<i>FULL LEGAL NAME</i>	<i>SSN</i>	<i>LEGAL ADDRESS</i>	<i>DATE &amp; PLACE OF BIRTH</i>	<i>CITIZENSHIP</i>

**2) DEATH/BURIAL WISHES**

<i>NAME</i>	<i>NOTE</i>

**3) CONTACT INFORMATION**

<i>TRADE NAME</i>	<i>COMPANY</i>	<i>PHONE</i>	<i>ADDRESS</i>
Attorney			
CPA			
Insurance Agent			
Financial Planner			
Banker			
Power of Attorney			
Guardian/Trustee			
Executor of Estate			
Doctor			
Doctor			
Doctor			
Dentist			

Notes:

**4) HEALTH INSURANCE POLICIES**

<i>INSURED</i>	<i>COMPANY</i>	<i>ISSUED</i>	<i>POLICY #</i>	<i>BENEFICIARY</i>	<i>CASH VALUE</i>	<i>INSURANCE AMOUNT</i>

**5) LIFE INSURANCE POLICIES**

<i>INSURED</i>	<i>COMPANY</i>	<i>ISSUED</i>	<i>POLICY #</i>	<i>BENEFICIARY</i>	<i>CASH VALUE</i>	<i>INSURANCE AMOUNT</i>

**6) DISABILITY INSURANCE POLICIES**

<i>INSURED</i>	<i>COMPANY</i>	<i>ISSUED</i>	<i>POLICY #</i>	<i>MONTHLY BENEFIT</i>	<i>WAIT PERIOD</i>	<i>BENEFIT PERIOD</i>

**7) HOMEOWNERS/AUTO**

<i>INSURED</i>	<i>COMPANY</i>	<i>ISSUED</i>	<i>POLICY #</i>	<i>INSURANCE COV</i>

**8) INVESTMENTS**

<i>OWNER/TYPE</i>	<i>COMPANY</i>	<i>BALANCE</i>	<i>BENEFICIARIES</i>

**9) AUTOMOBILES**

<i>TITLE OWNER</i>	<i>DRIVERS LICENSE #</i>	<i>MODEL/YEAR</i>	<i>APPROXIMATE VALUE</i>

**10) MOBILE PHONE**

<i>OWNER</i>	<i>PHONE NUMBER</i>	<i>COMPANY</i>

**11) BANK ACCOUNTS**

<i>ACCOUNT NAME</i>	<i>ACCOUNT #</i>	<i>BANK</i>	<i>APPROX. VALUE</i>

**12) REAL ESTATE**

<i>LOAN #</i>	<i>BALANCE</i>	<i>PAYMENT</i>	<i>INTEREST RATE</i>	<i>MATURITY DATE</i>	<i>PURCHASED DATE</i>	<i>PURCHASED PRICE</i>	<i>APPRAISED VALUE</i>

**13) TAXES**

<i>TAXPAYER</i>	<i>ESTIMATE AMOUNT DUE</i>	<i>ESTIMATE AMOUNT DUE DATE</i>

**14) CREDIT CARDS**

<i>ACCOUNT NAME</i>	<i>ACCOUNT #</i>	<i>BALANCE</i>	<i>RATE</i>

**15) PASSWORDS**

<i>TYPE</i>	<i>USER NAME</i>	<i>PASSWORD</i>

**16) CORPORATION(s)**

<i>CORPORATION NAME</i>	<i>TAX ID #</i>	<i>TYPE</i>

**17) CLUB MEMBERSHIP**

<i>MEMBERSHIP NAME</i>	<i>BALANCE</i>	<i>MONTHLY DUES</i>

**18) WILL**

<i>DATE SIGNED</i>	<i>ORIGINAL LOCATION</i>	<i>COPIES?</i>

**19) SAFE**

<i>COMBINATION</i>	<i>LOCATION</i>

**20) HOME ACCOUNTS – UTILITIES**

<i>ACCOUNT TITLE</i>	<i>COMPANY</i>	<i>ACCOUNT #</i>

**21) NEWSPAPER/MAGAZINE SUBSCRIPTIONS**

<i>ACCOUNT NAME</i>	<i>MAGAZINE NAME</i>	<i>EXPIRATION DATE</i>

**22) LOCATION OF FILES**

<i>DOCUMENTS</i>	<i>LOCATION</i>
Safe Deposit Box/Keys	
Most recent Tax Return	
Will/Trust	
Power of Attorney	
Birth Certificate	
Death Certificate of Spouse	
Marriage Certificate	
Divorce Decree	
Citizenship Verification	
Military Discharge Papers	

Personal Items (jewelry, etc)	