



RECORDS ORGANIZER

PERSONAL AND FINANCIAL INFORMATION

Important Phone Numbers:

Social Security..... 1-800-772-1213

Veterans Administration.....1-800-827-1000

Pension Administrator: _____

Attorney: _____

Trust Officer: _____

Accountant: _____

Bank Information: _____

Insurance Agent: (Life) _____

Insurance Agent: (Other) _____

Basic Information:

☐ Full Legal Name

Maiden Name (if applicable)

Name variations used on assets (incl. Nicknames)

☐ Addresses used other than current address

☐ Date and Place of Birth

Location of Birth Certificate



Family Information:

- ☐ Schools Attended, location and dates

Degrees attained, dates

Honors and achievements

Employment Information:

- ☐ Employers, location and years employed

Retirement Benefit information

Military Service Information:

- ☐ Branch of service, dates

- ☐ Civil Service Pension information

Location of Discharge Papers

Location of VA Insurance Policy

Religious Information:

- ☐ Name and Location of Church or Synagogue

Preferred minister, priest, or rabbi

Religious Information:

- ☐ Name and Location of Church or Synagogue

Preferred minister, priest, or rabbi

Organization Information:

- ☐ Names of fraternal organizations or associations



Legal and Death Related Information

Legal Information:

- ☐ Location of Will, name of Personal Representative

Location of Trust Documents, name of Trustee

Location of original Powers of Attorney, names of POA's

Funeral and Burial Arrangements:

- ☐ Name and location of preferred funeral home

Location of Preneed Funeral plan documents

Burial and Service preference

Life Insurance and Annuity Information

- ☐ List of all Life Insurance policy numbers and companies
Name of beneficiaries

Location of policies

- ☐ List of all annuity contracts
Current method of payment

Names of beneficiaries

Location of contracts



Asset Information

On an annual basis, make a list of your assets or copy your year end statements and keep it with this document as an easy reference.

Real Estate:

- ☐ Description of all property

Loan information

Location of Deeds

Banking Relationships:

- ☐ Safe Deposit Boxes

- ☐ Name and location of banks for any CDs, savings or checking accounts, loans

Investments:

- ☐ Names and phone numbers of Investment Manager or Brokers

- Location of securities records

- ☐ Individual Retirement Accounts, name of custodian or trustee

- ☐ Mutual Fund Company Information (or list attached)

Other Assests:

- ☐ Location of car titles
- ☐ Location of Savings Bonds
- ☐ Location of records on unique assests (i.e. artwork, collectibles, partnerships)