

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

- Marriage Information
Spouse name, date and place of birth

Spouse's family information

Location of Marriage License

Information on prior marriages

- Information on Children
Full legal name of each child, dates and places of birth

Names of spouses and children with dates of birth

- Parents Names, dates and places of birth
Phone Numbers and addresses

- Siblings Names, dates and places of birth
Phone Numbers and addresses

MISCELLANEOUS PERSONAL INFORMATION

EDUCATION 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

ORGANIZATION MEMBERSHIPS

- 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 preferences

LIFE INSURANCE AND ANNUITY INFORMATION

- List of all Life Insurance policy Numbers and companies
Names 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 ASSETS

- Location of Car titles
- Location of Savings Bonds
- Location of records on unique assets (ie., artwork, collectibles, partnerships)