

W O R K S H E E T

GENERAL PERSONAL INFORMATION

Full Legal Name	Date of Birth	Social Security Number

IMPORTANT LEGAL DOCUMENTS

Document	Person You've Authorized in Document	Phone Number	Location*
Durable Power of Attorney			
Medical Power of Attorney			
Last Will and Testament			

Medical Papers	Important Info	Notes	Location
Organ Donor Card	Are you an organ Donor? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Living Will	Have you signed a Living Will? <input type="checkbox"/> Yes <input type="checkbox"/> No		

*Executor for Last Will and Testament.' e.g. desk drawer, safety deposit box, file cabinet, etc.

W O R K S H E E T

Other Papers	Location	Other Papers	Location
Birth Certificate			
Marriage Certificate			
Divorce/Separation Papers			
Copies of Tax Returns			
Mortgage Documents			
Business Agreements			
Military Papers			

W O R K S H E E T

PROPERTY TITLES

Be sure to note whether property is owned jointly or only by you.

Property	Address/Description	How Owned?	Location
Home			
Other Real Estate			
Automobiles			
Other			

W O R K S H E E T

BANKS AND BROKERAGES

Location refers to where the account documentation is kept.

Account	Name	Account #	Ownership	Phone #	Location
Checking/Savings					
Credit Cards & Charges					
CDs, Money Market Accounts					
Brokerage Accounts**					

*All of them, please, especially the offshore tax dodge. **Do not include IRAs here, they go below.

W O R K S H E E T

RETIREMENT ACCOUNTS

Account	Account #	Contact	Phone #	Beneficiary	Location
IRAs*					
Employer-provided Retirement Plans					
Other					

*Include 401(k) and other employer plans that you rolled into a self-directed IRA. *401(k), 403(b), pension, profit-sharing, and deferred compensation plans



W O R K S H E E T

INSURANCE POLICIES

Be sure to list beneficiaries where applicable

Policy	Account #	Contact	Phone #	Payment Due	Location
Health					
Disability					
Homeowner					
Auto					
Life	Beneficiary				
Other					

W O R K S H E E T

DEBITS

"Due When" means monthly or monthly intervals.

Debt	Account	Contact	Phone #	Due When?



W O R K S H E E T

FUNERAL ARRANGEMENTS

List your wishes with regards to your funeral and burial. If you have already bought a burial plot, or made other arrangements, provide contacts.

Wishes

Contact	Phone #	For What

W O R K S H E E T

PERSONAL ADVISORS

Title	Name	Address	Phone #	Email
Emergency Contact				
Attorney				
Accountant				
Primary Physician				
Guardian for Children				
Minister/ Priest/ Rabbi/Yogi				
Electrologist				
Other				