

# Personal

## Vital Record Keeper

for Paper Documents  
and Summary of Financial Accounts

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Name: \_\_\_\_\_

### Emergency Contacts:

Name	Phone

## HOW TO USE THIS ORGANIZER

This organizer is meant to help you organize your important personal records. While you are living, it provides a convenient reference to the documents which you need to lay your hands on from time to time. When you pass away, the organizer enables your loved ones to quickly access all of the papers which they will need to deal with your funeral and estate.

You can use a “key” to indicate where each important document is located. For example, you might have three locations plus a safety deposit box in which you keep your documents and records. In this case, your “key” might look like the example which follows. If you do not currently have your documents and records organized, this is a good opportunity to gather them together and make sure you can locate all of your critical documents.

Example “key”:

<b>Key</b>	<b>Location</b>
<b>A</b>	Top drawer/green file cabinet in den
<b>B</b>	Second drawer/green file cabinet in den
<b>C</b>	Top left desk drawer
<b>D</b>	Safety deposit box

Take a moment now and record the primary locations of your important documents.

<b>KEY</b>	<b>Location</b>

The next step is to go through the organizer and verify and then note the location of each of your critical documents. You may want to write down the phone numbers, contact names, account numbers, and other items shown as you locate and record the location of each document. This can be of great assistance to you when you need to locate information in a hurry.

**Information needed in case of death**

<b>Document/Contact</b>	<b>Location/Info</b>
<b>Final instructions/Funeral Instructions</b>	
<b>Will</b>	
<b>Living Trust</b>	
<b>Additional copies of Will</b>	
<b>Additional copies of Living Trust</b>	
<b>Attorney name</b>	
<b>Executor Name</b>	
<b>Deed and Mortgage Info</b>	
<b>Cemetery Plot Records</b>	
<b>Life Insurance Policy</b>	
<b>Life Insurance Policy</b>	
<b>Other Death Benefit Info</b>	
<b>Pension info for Beneficiary/Survivor</b>	
<b>Auto title/Registration</b>	

**Information needed in case of incapacity**

<b>Document</b>	<b>Location</b>
<b>Power of Attorney for Health Care</b>	
<b>Power of Attorney for General Affairs</b>	
<b>Living Will</b>	
<b>Long Term Care Insurance</b>	
<b>Medical Insurance Policy</b>	
<b>Property Insurance Policy</b>	
<b>Auto Insurance Policy</b>	

**Other personal documents**

Document	Location
Birth Certificate	
Citizenship Papers	
Military Papers	
Marriage Certificate	
Divorce Papers	

**Financial Records**  
**Checking/Savings/Credit Union/CD Accounts**

Financial Institution Name & Address	Contact Name	Phone	Account Number	Location

**Notes/ Loans**

Financial Institution Name & Address	Contact Name	Phone	Account Number	Location



**Tax Records**

Document	Location
Location of Personal Income Tax Returns	
Location of Tax Return Support Info	

**Credit Cards/Revolving Accounts/Store Accounts**

Name of Credit Card/other Account	Account Number	Customer Service Ph #	Location

**SAFE DEPOSIT BOX KEY**

Financial Institution Name & Address	Safe Deposit Box Number	Key Location

## Advisors

### Attorney:

Name	Address	Phone
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### Physician:

Name	Address	Phone
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### Accountant:

Name	Address	Phone
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### Insurance Agents:

Name	Address	Phone
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### Banker:

Name	Address	Phone
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### Stock Broker:

Name	Address	Phone
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### Executor of Estate:

Name	Address	Phone
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### Clergy:

Name	Address	Phone
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### Dentist:

Name	Address	Phone
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**Other Important Contacts:**

Name	Address	Phone
Name	Address	Phone
Name	Address	Phone
Name	Address	Phone
Name	Address	Phone