

# Valuable Documents at Your Fingertips

## USEFUL INFORMATION

**Name** \_\_\_\_\_

**Date Completed** \_\_\_\_\_

**Primary Doctor** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Other Doctor** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Dentist** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Pharmacy** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Lawyer** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Accountant** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Power of Attorney** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Healthcare Agent** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Investment Broker** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Faith Leader** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Name of Bank** \_\_\_\_\_

*Acct #* \_\_\_\_\_

**Name of Bank** \_\_\_\_\_

*Acct #* \_\_\_\_\_

**Emergency Contact** \_\_\_\_\_

*Phone* \_\_\_\_\_

**Emergency Contact** \_\_\_\_\_

*Phone* \_\_\_\_\_

**PERSONAL INFORMATION**

*Where Is It Kept?*

<b>Social Security #</b>	_____
<b>Birth Certificate</b>	_____
<b>Marriage Certificate</b>	_____
<b>Divorce Papers</b>	_____
<b>Military Records:</b>	
<i>Military ID #</i>	_____
_____	
<i>Dates of Service</i>	_____
_____	
<i>Branch of Service</i>	_____
_____	
<b>Organ Donor Card</b>	_____
<b>Passport/ Citizenship Papers</b>	_____
<b>Will</b>	_____
<b>Trusts</b>	_____
<b>Safety Deposit Box:</b>	
<i>Where are keys kept?</i>	_____
<i>Number</i>	_____
_____	_____

**INSURANCE INFORMATION**

*Where Is It Kept?*

<b>Automobile</b>	_____
<b>Disability</b>	_____
<b>Homeowners</b>	_____
<b>Life</b>	_____
<b>Long-Term Care</b>	_____
<b>Health</b>	_____
<i>Other</i>	_____

**FINANCIAL INFORMATION**

*Where Is It Kept?*

**Automobile Title/  
Registration**

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**Automobile Title/  
Registration**

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**Bank Statements**

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**Bonds**

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**CDs**

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**Bank Account:**

*Checking*

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*Savings*

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*Money Market*

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**401K Account**

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**IRAs**

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**Mortgage Information**

**Outstanding Loans**

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**Property Deeds/Title**

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**Stock Certificates**

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**Income Tax Records**

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**Pension Records**

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**Utility Bills**

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**MEDICAL INFORMATION**

*Where Is It Kept?*

**Advance Directives**

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**Do Not Resuscitate**

**Papers**

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**Healthcare Power**

**of Attorney**

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**Living Will**

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**FINAL WISHES**

*Where Is It Kept?*

**Letter of Instruction**

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**Burial Arrangements**

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**Cemetery Information**

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**Funeral Home**

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