

NAME:		DATE:	
WHERE I KEEP MY DOCUMENTS			
DOCUMENT		LOCATION	
ORIGINALS OF WILL / TRUST / POWERS OF ATTORNEY			
COPIES OF WILL / TRUST / POWERS OF ATTORNEY			
SAFE DEPOSIT BOX LOCATION			
LOCATION OF KEY			
BOX NUMBER			
AUTHORIZED SIGNERS			
HOME SAFE LOCATION			
HOME SAFE COMBINATION			
DEED TO HOME			
DEED TO OTHER REAL PROPERTY			
LIFE INSURANCE POLICIES			
CAR TITLE			
OTHER:			

IMPORTANT INFORMATION	
BANK NAME	ACCOUNT NUMBERS:
1.	
2.	
3.	
4.	
BANK ACCOUNT LOGIN	BANK ACCOUNT PASSWORDS
RETIREMENT PLAN NAME	
CONTACT PHONE NUMBER	

IMPORTANT INFORMATION

IRA	ROTH IRA
BROKERAGE ACCOUNTS WITH:	ACCOUNT NUMBERS
1.	
2.	
3.	
4.	
BROKERAGE ACCOUNT LOGIN	BROKERAGE ACCOUNT PASSWORDS
1.	
2.	
3.	
4.	
LIFE INSURANCE COMPANY:	POLICY NUMBER:
1.	
2.	
3.	
4.	
TAX RETURN COPIES / INFORMATION	
TAX PREPARER NAME AND PHONE NUMBER	
TAX PREPARER NAME AND PHONE NUMBER	
CREDIT CARD ISSUER	CREDIT CARD NUMBERS:
1.	
2.	
3.	
4.	
COMPUTER PASSWORD	
LAPTOP PASSWORD	
QUICKEN PASSWORD	

IMPORTANT INFORMATION

E-MAIL ACCOUNTS

E-MAIL PASSWORDS

1.

2.

3.

4.

CHILDRENS' NAMES, ADDRESSES, PHONE NUMBERS; OTHER NOTES