

MY INSURANCE & INVESTMENTS

INVESTMENTS & INSURANCE (ANNUITIES, ETC.)

Account Type	Company	Account #	Issue Date	Maturity Date	Amount	Primary Beneficiary	Contingent Beneficiary

OTHER INSURANCE ACCOUNTS (LIFE, HEALTH, HOME, AUTO, ETC.)

Account Type	Company	Account #	Issue Date	Maturity Date	Amount	Primary Beneficiary	Contingent Beneficiary
Life Insurance							
Health Insurance	1st						
	2nd						
Prescription Plan	1st						
	2nd						
Home/Rental Insurance							
Auto Insurance							

IMPORTANT DOCUMENTS: LOCATION GUIDE

DOCUMENT	A	B	C	D	E	F
Last Will & Testament						
Revocable Living Trust						
Durable Powers of Attorney (Finances)						
Durable Power of Attorney (Healthcare)						
Property Deeds						
Property Tax Bills						
Time Share Deeds						
Promissory Notes						
Mobile Home Registration						
Installment Contracts						
Life Insurance						
Annuities						
Stock & Bond Certificates						
Checkbooks						
Tax Records						
CD Certificates						
Limited Partnership Papers						
Oil & Gas Interest Forms						
Marriage Certificates						
Birth Certificates						
Divorce Papers						
Military Discharge Papers						
Military Pension Document						
Social Security Card						
Immigration Papers						
Naturalization Papers						
Passports						
Vehicle Registration						
Adoption Papers						
Health Insurance Information						
Retirement Plans						

LOCATION KEY

A	
B	
C	
D	
E	
F	

IMPORTANT CONTACTS

FINANCIAL PLANNER	INSURANCE AGENT
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
ESTATE PLANNER	ATTORNEY
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
ACCOUNTANT/TAXES	BUSINESS ASSOCIATE
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
LANDLORD	FUNERAL HOME
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
DOCTOR	EXECUTOR
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:
BANKING CONTACT	PASTOR
Name:	Name:
Address:	Address:
Phone:	Phone:
Email:	Email:

COMPLIMENTS OF: