MY INSURANCE & INVESTMENTS

INVESTMENTS & INSURANCE (ANNUITIES, ETC.)

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

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

Account Type		Company	Account #	lssue Date	Maturity Date	Amount	Primary Beneficiary	Contingent Beneficiary
Life Insurance								
Health	1st							
Insurance	2nd							
Prescription	1st							
Plan	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

Α	
В	
С	
D	
Е	
F	

IMPORTANT CONTACTS

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

COMPLIMENTS OF: