

PERSONAL INFORMATION ORGANIZER

A valuable tool to help you catalog important life documents

Personal information organizer

Do you know where all your important personal, legal and financial information is? Having this information all in one place makes it easy to locate during an emergency or for estate planning. It's a simple way to minimize stress for your loved ones and helps protect against identity theft or fraud.

Fill out the applicable sections of this form and store it securely in a filing cabinet or fireproof box. Be sure to tell someone you trust (such as a spouse or sibling) where it's located.

Your name: _____

Address: _____

Phone: _____ Email: _____

Birth date: _____ Social Security number: _____

Key contacts	Name/business	Phone/email
Financial professional		
CPA/accountant		
Insurance agent		
Attorney		
Executor of estate		
Power of attorney (durable/healthcare)		
Trusted contact 1		
Trusted contact 2		
Trusted contact 3		

Important documents/information	Location
General Items	
Birth certificate	
Social Security card	
Passport/citizenship (naturalization papers)	
Driver's license number and expiration date	
Adoption papers	
Marriage certificate	
Prenuptial agreement	
Divorce or separation papers	
Safe deposit box(es) and keys	
Safe and combination	
Investment documents	
Brokerage account statements	
Mutual fund account statements	
Annuity account statements	
Individual retirement plan statements (IRA/Roth)	
Company retirement plan statements (401k/403b/457)	
Other company benefits (e.g., deferred compensation and pension)	
Stock certificates not held in an account	
Bearer bonds not held in an account	
Alternative investment documents (including K-1s)	
529 college savings plan statements	
Beneficiary forms for IRAs, 401(k)s, other benefits plans or transfer on death (TOD) documents showing cost basis of securities owned or sold	
Online securities access information	

Important documents/information	Location
Personal financial documents	
Inventory of valuable items	
Appraisals for valuable items	
Buy/sell or partnership agreements	
Deferred compensation agreements	
Federal/state gift-tax returns	
Prior years' tax returns	
Motor vehicle title and/or registration papers	
Lawsuit or documents on pending legal actions	
Promissory notes	
Outstanding loans	
Mortgage documents	
Medical bills/records, prescription plan card	
Property and school tax records	
Real estate deeds and/or other titles of ownership	
Rental and/or lease agreements	
Trust documents/agreements	
Bank/credit documents	
Checking or money market account statements	
Checks/debit cards	
Savings accounts	
Credit cards and account statements	
Credit union account books or statements	
Payable on death (POD) documents	

Important documents/information	Location
Insurance documents	
Mortgage insurance policy	
Travel insurance policy	
Property and casualty policy documents	
Veterans Administration insurance papers	
Beneficiary forms for insurance or annuity policies	
Long-term care insurance policy	
Life insurance policy documents	
Bank/credit documents	
Checking or money market account statements	
Checks/debit cards	
Savings accounts	
Credit cards and account statements	
Credit union account books or statements	
Payable on death (POD) documents	
Emergency documents	
Living will/healthcare proxy	
Durable power of attorney	
Financial institution's proprietary power of attorney (Some financial institutions may refuse to accept a standard power of attorney.)	
Paperwork for final arrangements	
Last will and testament (Wills should not be kept in a safe deposit box. Rather, They should be stored in either a lawyer's will safe or a fireproof safe at your home.)	
Military discharge papers (Veterans receive a small stipend toward burial expenses.)	
Burial instructions (type of service, pallbearers, final wishes, etc.)	

Important documents/information	Location
Paperwork for final arrangements (continued)	
Cemetery plot deed	
Pre-paid cremation documents	
Funeral home preference and information	
Charitable donations preference(s)	
Letter of instruction (if available) from the deceased to executor	
Death certificate	
The number of accounts or titles of ownership of the deceased	
Phone number/address of County Surrogate Court (<i>The county court or clerk's office where the decedent resided will oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i>)	
Information for obituaries	

Notes:

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
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