

Getting It Together

Preparing Your Financial Information and Paperwork for an Emergency

Information Archive for My Family

Estate of: _____

Date: _____

Please keep this profile sheet, checklist and any documents with sensitive information secure by saving them in a locked box or by scanning and saving to a password protected file.

Household Member Profile Sheet

Full Legal Name _____

Legal Residence _____

Date and Place of Birth _____

Location of Will _____

SPOUSE

Name _____ Birthdate _____

Address _____ Phone _____

CHILDREN

Name _____ Birthdate _____

Address _____ Phone _____

Name _____ Birthdate _____

Address _____ Phone _____

Name _____ Birthdate _____

Address _____ Phone _____

Name _____ Birthdate _____

Address _____ Phone _____

Name _____ Birthdate _____

Address _____ Phone _____

EMPLOYERS

Employer _____ Dates: _____

Employer _____ Dates: _____

Employer _____ Dates: _____

Employer _____ Dates: _____

EDUCATION

(when and where) _____

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MILITARY SERVICE

RELIGIOUS CONTACTS

Name _____

Phone _____

Affiliation _____

Name _____

Phone _____

Affiliation _____

Name _____

Phone _____

Affiliation _____

Name _____

Phone _____

Affiliation _____

MEMBERSHIPS IN GROUPS

Organization _____

Position _____

Organization _____

Position _____

Organization _____

Position _____

AWARDS RECEIVED

Award _____

Organization _____

Award _____

Organization _____

SPORTS LEAGUES OR TEAMS

OTHER AFFILIATIONS

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Close Friends

Name: _____ Phone: _____

Name: _____ Phone: _____

Name: _____ Phone: _____

Name: _____ Phone: _____

Name: _____ Phone: _____

Relatives

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Name: _____ Phone: _____ Relationship _____

Doctors (Primary Care Physician, Dentist, Etc.)

Name: _____ Phone: _____ Type _____

Name: _____ Phone: _____ Type _____

Name: _____ Phone: _____ Type _____

Name: _____ Phone: _____ Type _____

Name: _____ Phone: _____ Type _____

Attorney

Name: _____ Phone: _____

Accountant

Name: _____ Phone: _____

Financial Advisor

Name: _____ Phone: _____

SAFE DEPOSIT BOX

Location/Key _____

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Document Checklist

LEGAL

- Will Location _____
 - Trust Location _____
 - Power of Attorney..... Location _____
Type _____
 - Power of Attorney..... Location _____
Type _____
 - Power of Attorney..... Location _____
Type _____
-

SELF IDENTIFICATION

- Social Security Card Location _____
 - Drivers License Location _____
 - Passport Location _____
 - Citizenship Papers Location _____
 - Work Permit..... Location _____
-

MILITARY

- Service ID/DoD ID Location _____
 - VA Number Location _____
 - Service Records..... Location _____
-

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Document Checklist (cont'd)

FAMILY RELATIONSHIPS

- Birth Certificate Location _____
 - Baptismal Certificate Location _____
 - Prenuptial Agreement..... Location _____
 - Marriage Certificate Location _____
 - Divorce Decree Location _____
 - Adoption Papers Location _____
 - Custody Documents Location _____
 - Pet Ownership Records..... Location _____
-

HEALTH INFORMATION

- Health Insurance Card Location _____
 - Online Medical Records Logins..... Location _____
 - List of Medications..... Location _____
 - List of Allergies Location _____
 - List of Medical Conditions Location _____
 - Disability Records Location _____
 - Living Will Location _____
 - Power of Attorney for Healthcare..... Location _____
 - Advance Directives Location _____
-

INCOME TAX RETURNS

- Last 1-3 Years Location _____
-

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Document Checklist (cont'd)

FINANCIAL INFORMATION

BANKING

- Checking Accounts List..... Location _____
- Savings Accounts List Location _____
- Certificates List..... Location _____

SOURCES OF INCOME

- Current Employer Location _____
- Pension Location _____
- IRA Distributions Location _____
- 401(k) Distributions Location _____
- Interest Income Location _____

INVESTMENTS

- Stocks Location _____
- Bonds Location _____
- IRAs Location _____
- 401(k)..... Location _____
- Property Location _____

INSURANCE POLICIES

- Life Location _____
- Long-term Care Location _____
- Disability..... Location _____
- Homeowners..... Location _____
- Flood..... Location _____
- Vehicle Location _____
- Supplemental Location _____

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Document Checklist (cont'd)

ONGOING FINANCIAL OBLIGATIONS

- Mortgage Information..... Location _____
 - Loan Information Location _____
 - Alimony Location _____
 - Child Support..... Location _____
 - Property Taxes Location _____
 - IRA Contributions..... Location _____
 - 401(k) Contributions..... Location _____
 - Other Location _____
-

HOUSEHOLD FINANCIAL OBLIGATIONS

- Rent/Rental Agreement..... Location _____
 - Cable/Internet Location _____
 - Utilities Location _____
 - Gym Location _____
 - Subscriptions..... Location _____
 - Tuition Location _____
 - Child Care..... Location _____
-

WARRANTIES

- Home..... Location _____
 - Other Location _____
-

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Document Checklist (cont'd)

OWNERSHIP RECORDS

PHYSICAL ASSETS (Titles/Registrations/Deeds)

- Vehicles Location
Homes Location
Land Location
Watercraft Location
Motorcycles Location
RVs Location
Photos/Videos of Assets Listed Above Location
Property Value Assessments Location

OTHER ASSETS

- Photos/Videos Appliances Location
Photos/Videos Electronics Location
Photos/Videos Collectibles Location
Photos/Videos Artwork Location
Photos/Videos Other Prized Possessions Location

DIGITAL ASSETS

- Transactional/Banking Location
Social Media Location
Family Videos/Photos Location
Audio Books Location
Music Library Location

- CASH Location