



TOOL FOR YOUR LOVED ONES

1. BASIC INFORMATION

- a. Name:

- b. Address:

- c. Phone numbers:

- d. Social Security Number:

- e. Emergency contact:

2. FINANCIAL INFORMATION

- a. Investment counsel:

- b. Accountant
 - i. Name

 - ii. Address

- c. Bank
 - i. Bank box (name, location, location of key, who has access?)

 - ii. Broker

- d. Safe at home (who has code/key)

- e. Credit cards:

- f. Post office box (number, location, keys held by):

- g. Passwords; who has list/where?:

3. LEGAL INFORMATION

- a. Lawyer's name:
 - i. Location of the will:



- b. **Executor of will:**
- c. **Power of attorney:**
- d. **Living will (date/location/powerholder of each document):**
- e. **Advance directive for health care, durable powers:**
- f. **Real estate records – (esp. if second home or investment property; mortgage/HELOC info.; property tax & insurance info):**

4. INSURANCE INFORMATION

- a. **Life (company and contact):**
- b. **Health:**
- c. **Property:**
- d. **Car(s) (license plate(s), service, spare key(s):**
- e. **Other:**

5. MEDICAL INFORMATION

- a. **Primary care physician:**
- b. **Other physicians:**
- c. **Medications:**
- d. **Pharmacy:**
- e. **Health insurance:**
- f. **Allergies and blood type:**



g. Dentist:

h. Who to call in a health emergency:

6. MISCELLANEOUS INFORMATION

a. House repairs:

b. Electrician:

c. Appliance repairs:

d. Neighborhood security (neighbor contact):

e. Alarm code (instructions on exit/enter):

f. Computer passwords (who has list, email address + password, social media accts +password):

g. Plumber:

h. Yard service:

i. Irrigation service:

j. Handy man:

k. Safe or lock code:

l. Invisible fence:

m. Other (pets, vets, boarding contact, roof repair, fence repair, second home (beach, mountains, add new, other etc.):

n. Spouse or family members (neighbor contact):

o. Locations of keys, tax records other documents: