

# Important Contact and Information Form

Contacts	Name	Contact Information
Attorney		
Banker		
Realtor		
Executor		
Trustee		
Insurance Agent		
Employer		
Veterans Administration		
Doctor		
Religious Community Leader		
Funeral Home		
Pre-paid Funeral Services Provider		
Power of Attorney – Finances		
Healthcare Proxy		
Dependents		
Other		

Important Documents	Location
Trust Documentation	
Last Will and Testament	
Durable Power of Attorney	
Living Will / Healthcare Advanced Directive	
Birth Certificate	
Passport	
Social Security Card	
Citizenship Documentation	
Marriage License	
Divorce Decree	

Family Tree	
Educational Degrees	
Professional Licenses	
Property Deed	
Car Title	
Military Documentation	
Land, Oil, or Mineral Rights Documentation	

### Final Arrangements

Pre-paid Funeral Plan Policy	
Pre-purchased Plot/Burial Site Information	
Pre-purchased Crematory Services	
Pre-purchased Mausoleum Site Information	
Bank Account with funds for last expenses	

### Location of Financial Assets

Banking	Bank Location	Account Number
Savings Account		
Checking Account		
ATM/Debit Card		
Safe Deposit Box		
Stocks		
Bonds		
Certificate of Deposit		
Roth IRA		
IRA		

Investments	Account Number	Location	Contact Name and Phone Number
Mutual Fund			
Annuity			
IRA			

Pension	Account Number	Location	Plan Administrator's Name and Phone Number
401(k) Plan			
403(b) Plan			
Union Pension			
Company Pension			

### Location of Financial Liabilities

Type	Account Number	Creditor Name
Mortgage Note(s)		
Car Note(s)		
Credit Cards		
Cash Advance Loans		
Personal Loans		
Student Loans		
Other		

### Insurance Policies

Type	Insurance Company Name	Policy/Plan ID Number	Contact Information
Medical Insurance			
Life Insurance			
Dental Insurance			
Homeowner's Insurance			
Renter's Insurance			
Long-Term Care			
Accidental Death & Dismemberment			
Disability			
Vehicle			
Other			

### Digital Accounts

Type	Domain Name (Website link)	What would you like to do with each account?
Facebook		
Instagram		
Twitter		

Pinterest		
LinkedIn		
Google (Gmail)		
Yahoo Mail		
Hotmail		
Personal Website		
Other		