

# Record of Important Documents

Name \_\_\_\_\_

Date \_\_\_\_\_

## Personal

Indicate the location of each document.

Birth Certificate \_\_\_\_\_

Deed/Title to property \_\_\_\_\_

Passport \_\_\_\_\_

Divorce Papers \_\_\_\_\_

Marriage Certificate \_\_\_\_\_

Automobile Title(s) \_\_\_\_\_

Social Security Card \_\_\_\_\_

Military Service Record(s) \_\_\_\_\_

## Financial

Indicate the bank name, address, telephone number, and account number for each account.

Bank Account (Checking)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bank Account (Saving)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Mortgage

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Safe Deposit Box/Box Number/Keys

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Insurance

Indicate the insurance company name, address, telephone number, and policy number for each policy.

Life Insurance

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Health Insurance

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Automobile Insurance

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Property Insurance

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Legal

Indicate the location of each document and, if applicable, an authorized individual.

Will \_\_\_\_\_

Trust \_\_\_\_\_

Power of Attorney \_\_\_\_\_

## Other

Designation of Beneficiary Forms \_\_\_\_\_

Keys and Combinations \_\_\_\_\_

Social Media Accounts \_\_\_\_\_

Email Address (1) \_\_\_\_\_

Email Address (2) \_\_\_\_\_

**Credit Card(s)/Debit Card(s)**

**Circle Credit or Debit**

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

Credit / Debit Card  
Issuer \_\_\_\_\_  
Account No. \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code: \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Utilities**

**Electricity**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Natural Gas / Propane**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Water**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Trash**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Cable / Satellite**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Phone / Mobile Phone**

Utility Company Name \_\_\_\_\_  
Account No. \_\_\_\_\_  
Payment Address \_\_\_\_\_  
Customer Service Phone ( ) \_\_\_\_\_  
Online Account ID \_\_\_\_\_  
Password \_\_\_\_\_

**Notes or Special Instructions:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_