



Record of Personal Affairs

Attorney _____ *Phone* _____

Address _____

Accountant _____ *Phone* _____

Address _____

Executor / Administrator _____ *Phone* _____

Address _____

Stock Broker _____ *Phone* _____

Address _____

Bank _____ *Phone* _____

Address _____

Life Insurance Company _____ *Phone* _____

Address _____

Pension or Union Plan _____ *Phone* _____

Address _____

Real Estate Broker _____ *Phone* _____

Address _____

Physician _____ *Phone* _____

Address _____

Important Documents Checklist

- _____ *Birth certificate*
- _____ *Marriage certificate*
- _____ *Insurance policies*
- _____ *Last will and testament*
- _____ *Bank account numbers / passbooks*
- _____ *Mortgage papers*
- _____ *Safety deposit box location*
- _____ *Funeral prearrangement contract*

- _____ *Stocks and bonds*
- _____ *Pension / union plan*
- _____ *Military records*
- _____ *Auto records / papers*
- _____ *Cemetery property deed*
- _____ *Credit cards / numbers*
- _____ *Special message to my family*
- _____ *Other*