

My Legacy



Name:

DOB:

SSN:

Important Contacts

	Name	Account # (if any)	Phone number	Email
Attorney				
Accountant and/or tax preparer				
Financial advisor / broker				
General insurance agent				
Life insurance agent				
Executor				
Beneficiaries				
Trustee				
Other				

Financial management

	Financial institution	Account #	Phone number
Checking account(s)			
Savings account(s)			
Credit card(s)			
Car loan(s)			

Investments and retirement

	Financial institution/issuer	Account #	Phone number
Bonds			
Stock			
Mutual funds			
401K			
IRA			
Roth IRA			
Employer plan or pension			

Insurance policies

	Insured's name	Amount of coverage	Policy number	Company Name	Phone
Life					
Health					
Disability					
Dental					
Vision					
Automobile					
Homeowners/property owners					
Renters					
Business					
Medicare					
Long-term care					
Other					

Personal documents

	Name	Address	Phone number
Military			
Church			
Veteran organization			
Other			

Make sure to keep hard copies of these personal documents in a safe place for easy reference when needed:

- Power of Attorney
- Healthcare directive
- Trust fund paperwork
- Instructions regarding disposition of remains
- Will
- Death certificates
- Marriage certificate
- Divorce, separation, or annulment papers
- Guardianship papers
- Birth certificates
- Adoption papers

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