

My Important Information Organizer

Keep important information in one place for peace of mind.

Prepared for:

Date:

Last Updated:

1

MY CONTACT INFORMATION

How to reach me.

Name	Phone	Email	Address	Notes

2

IMPORTANT PEOPLE TO CONTACT

Key professionals and trusted contacts.

Name	Role	Phone	Email	Address	Notes

3

INSURANCE COMPANIES

Life, health, auto, home, long-term care or other insurance policies.

Company	Insurance Type	Policy No. (partial)	Agent	Phone	Email	Notes

4

FINANCIAL INSTITUTIONS

Banks, credit unions, investment firms or other financial accounts.

Institution	Account Type	Acct. No. (partial)	Phone	Website	Notes

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FOR YOUR SECURITY: Do not write passwords, PINs, Social Security numbers, or full account numbers in this organizer.

This organizer is for personal organization only and is not intended to provide financial, legal or tax advice.

5

WHERE TO FIND IMPORTANT DOCUMENTS

Locations of key documents.

Document	Location	Notes
Will		
Trust		
Power of Attorney (Financial)		
Healthcare Proxy / Medical Directive		
Beneficiary Information		
Deeds / Real Estate Documents		
Vehicle Titles		
Insurance Policies		
Tax Returns		
Other		

6

EMERGENCY CONTACTS

Family members or others to contact in an emergency.

Name	Relationship	Phone	Email	Notes

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ADDITIONAL NOTES

Anything else my family should know.