Personal Information Organizer

Advanced Insurance Marketing Group • Everything your loved ones need to know

WELCOME TO YOUR ORGANIZER

Use this organizer to keep your key legal, financial, medical, professional, and account details in one place, so the people you trust can find what they need in an emergency.

How to use it: look through every section first, then fill it in on screen or by hand. Keep it somewhere safe, tell a trusted loved one where to find it, and update it whenever something changes.

LAST UPDATED

PERSONAL INFORMATION

NAME

BIRTHDATE

BIRTHPLACE

SOCIAL SECURITY NUMBER

ADDRESS

MILITARY SERVICE

☐ Yes ☐ No

BRANCH OF SERVICE

YEARS SERVED

WORK CONTACTS

EMPLOYER NAME

EMPLOYER PHONE

SUPERVISOR'S NAME

SUPERVISOR'S PHONE

SUPERVISOR'S EMAIL

KEY CONTACTS

NAME	RELATIONSHIP TO YOU	ADDRESS	PHONE NUMBER

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MEDICAL INFORMATION

INFORMATION	DETAILS
Hospital of choice	
Primary care physician	
Medical power of attorney / living will / advance care directive	
Medicare card number	
Health insurance or VA policy/card number	
Health care proxy	
Online personal health record	
Dentist	
Other	

BUSINESS & PERSONAL CONTACTS

ADVISORS	NAME	PHONE NUMBER
Executor of estate		
Attorney		
Banker		
Broker		
Accountant / tax preparer		
Insurance agent(s) and life insurance policy number		
Financial planner / investment professional		
Company benefits administrator		
Other		

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PERSONAL FINANCES

ACCOUNT	FINANCIAL FIRM / BANK NAME	ACCOUNT NUMBER / DOCUMENT LOCATION	NAMES, IF JOINT ACCOUNT	WEBSITE, USERNAME & PASSWORD	BENEFICIARY NAME(S)
Checking accounts					
Savings / money market accounts					
Certificates of deposit					
Credit cards					
Trust account					
Safe-deposit box and key					
Other					

RETIREMENT & EDUCATION ACCOUNTS

The beneficiary designation must be on the retirement account itself. If you're unsure, contact the institution to verify.

ACCOUNT TYPE	ACCOUNT NUMBER	FINANCIAL INSTITUTION / TRUSTEE	PHONE NUMBER	BENEFICIARY NAME(S)	WEBSITE, USERNAME & PASSWORD
401(k), 403(b) or other employer-sponsored plans					
457 deferred compensation plan or pension					
Traditional IRAs					
Roth IRAs					
Keogh, SEP or SIMPLE					
Annuities					
Social Security benefits					
Other					

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EDUCATION ACCOUNTS

ACCOUNT TYPE	ACCOUNT NUMBER	FINANCIAL INSTITUTION / TRUSTEE	PHONE NUMBER	BENEFICIARY NAME(S)	WEBSITE, USERNAME & PASSWORD
529 qualified tuition plan / education IRA / Coverdell ESA					

REAL ESTATE

OWNER(S)	ADDRESS	PROPERTY TYPE	OWNERSHIP TYPE	MORTGAGE ISSUER & ACCOUNT NUMBER	MORTGAGE ISSUER PHONE

INVESTMENTS

ASSET	ACCOUNT NUMBER / DOCUMENT LOCATION	WEBSITE, USERNAME & PASSWORD	ISSUER / FINANCIAL INSTITUTION CONTACT
Brokerage accounts			
Mutual funds			
Annuities			
Bonds			
Stock certificates			
Savings bonds			
Other			

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INSURANCE

INSURANCE TYPE	POLICY NUMBER / DOCUMENT LOCATION	ISSUER / FINANCIAL INSTITUTION CONTACT
Life		
Homeowners		
Automobile		
Medical		
Disability / accident		
Long-term care		
Other		

LOANS

LOAN TYPE	ACCOUNT NUMBER / DOCUMENT LOCATION	LENDER CONTACT INFORMATION	WEBSITE, USERNAME & PASSWORD
Auto			
Mortgage			
Boats / recreational vehicles			
Personal			
Student			
Other			

PERSONAL PROPERTY & OTHER VALUABLES

ASSET	PURCHASE PRICE	STORAGE FACILITY DETAILS	BENEFICIARY NAME(S)

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VALUABLE PAPERS

Where each legal document is located.

Mortgage papers / title		Homeowners insurance policies	
Birth certificate		Marriage certificate	
Prenuptial agreement(s)		Post-nuptial agreement(s)	
Divorce papers		Adoption papers	
Children's custodial papers		Naturalization papers / passports	
Social Security card(s)		Employment records	
Armed forces records / military discharge papers		Insurance papers (life, health, home, auto)	
CDs / stock certificates		Savings bonds / bonds	
Brokerage account statements		My safe location and combination	
Off-site storage location, unit number and key		Motor vehicle title(s)	
Buy/sell or cross-purchase agreements		Employer contracts	
Deeds or copies to real estate		My last will and testament	
Spouse's last will and testament		Living will	
Life insurance		Trust agreements	
Tax returns		Power(s) of attorney (POA)	
Financial POA		Medical POA / health care proxy	
Do not resuscitate order (DNR)		Other	
Other			

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DIGITAL INFORMATION

Update this section often, especially passwords.

TYPE	USERNAME	PASSWORD
Personal computer		
Laptop		
Tablet		
Cellphone		
Voicemail		
House alarm		
Other		
Other		

ACCOUNT TYPE & EMAIL ADDRESS	USERNAME	PASSWORD	HOW TO HANDLE ACCOUNT (E.G., CLOSE, NOTIFY FRIENDS/FOLLOWERS)
Personal / business email accounts			
Personal / business social media accounts			
Digital media storage accounts (photos, videos, music)			
Rewards / frequent-flier programs			
Medical / fitness programs			
Other key website information			

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MY WISHES

Use this space to leave a personal message for your loved ones and to record your final arrangements.

A MESSAGE TO MY LOVED ONES

FINAL ARRANGEMENTS

MY PREPLANNING DOCUMENTS ARE LOCATED

IF NOT PREPLANNED, MY FINAL WISHES ARE TO BE

☐ Buried ☐ Cremated ☐ Other Other:

BURIAL WISHES (E.G., CEMETERY, LOCATION, ASHES, OTHER)

FUNERAL HOME

CLERGY

OBITUARY

DONATIONS IN LIEU OF FLOWERS

PETS

OTHER

NOTES

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