



DOCUMENTATION

Basics

Date record was created _____

Date(s) revised _____

Photocopies given to _____

Personal Information

Name	Date of Birth	Social Security Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Notes:



DOCUMENTATION

Important Contacts

Lawyer

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

General Insurance Agent

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

Executor

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

Life Insurance Agent

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

Financial Advisor

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

Account/Tax Preparer

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____

Trustee/Other

Name	Work Phone	Cell/Home Phone	Company name and account number (if any)	Email
_____	_____	_____	_____	_____



DOCUMENTATION

Legal Documents

Birth Certificates

Name	Date of Birth	Place of Birth	Certificate #	Location of Certificate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Adoption Papers

Name	Date of Birth	Place of Birth	Certificate #	Location of Certificate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Guardianship

Guardian for	Date of Guardianship	Attorney	Named Guardian	Location of Records
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____



DOCUMENTATION

Legal Documents

Marriage Certificates

Certificate for	Date of Marriage	Place of Marriage	Certificate #	Location of Certificate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Divorce/Separation/Annulment Papers

Divorce Decree for	Date of Divorce	Place of Birth	Certificate #	Location of Certificate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Death Certificates

Certificate for	Date of Death	Place of Death	Certificate #	Location of Certificate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Military Records

Record for (name)	Type of Record	Place of Death	Location of Document
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



Legal Documents

Wills

Will for	Date of Will	Attorney	Executor	Location of Will
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Trusts

For the benefit of	Date of Trust	Attorney	Trustee	Location of Trust
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Notes:



DOCUMENTATION

Legal Documents

Living Wills

Living Will for	Dated	Attorney	Who can make decisions for me	Location of Living Will
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Living Wills (health care, property, etc.)

Power of Attorney (POA) for	Date of POA	Attorney	Person Named POA	Location of Living Will
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____



DOCUMENTATION

Loans and Liabilities

Credit Card Information (Credit Card 1)

In Whose Name

Creditor

Creditor's Phone Number

Account Number

Credit Card Information (Credit Card 2)

In Whose Name

Creditor

Creditor's Phone Number

Account Number

Credit Card Information (Credit Card 3)

In Whose Name

Creditor

Creditor's Phone Number

Account Number

Credit Card Information (Credit Card 4)

In Whose Name

Creditor

Creditor's Phone Number

Account Number



DOCUMENTATION

Loans and Liabilities

Outstanding Loans

From Whom

Phone Number

Location of Records
