

PERSONAL CAPITAL®

# Financial Life Organizer

NAME

# Key Contacts

	NAME	TELEPHONE
Family member		
Family member		
Friend		
Primary care physician		
Pediatrician		
Guardian		
Primary medical insurance		
Financial advisor		
Attorney		
Executor		
Power of attorney		
Accountant/CPA		
Dentist		
Veterinarian		

# Personal Documents

## LOCATION OF DOCUMENT

Social Security card

Birth certificate

Passport

Drivers license

Adoption papers

Marriage certificate

Prenuptial agreement

Divorce or separation papers

Safe & combination

Safe deposit box & key

## OWNERSHIP

Real estate deed

Motor vehicle title

Other

## TAX

Prior year's federal & state returns

Federal/state gift returns

Property tax records

# Investment/Lending Documents

	PROVIDER	LOCATION OF DOCUMENT
Brokerage accounts		
Stock certificate <i>(not held in accounts)</i>		
Alternative investments		
529 accounts		
Costs basis papers		
Retirement accounts		
Other company benefits (stock options/deferred comp)		
Beneficiary forms on retirement accounts		
Other		
<b>CREDIT &amp; LENDING</b>		
Mortgage		
Home equity line of credit		
Credit line account		
Car loan		
Other outstanding loans		
Other		

# Estate Planning Documents

## LOCATION OF DOCUMENT

Last will & testament

Living will/  
health care power of attorney

Durable power of attorney

Burial instructions

Cemetery plot deed or  
prepaid cremation papers

Funeral home preference

Letter of instruction to executor

Death certificate

Other

## INSURANCE

Long-term care policy

Life insurance policy

Group life policies

Health & accident insurance cards  
and claims

Mortgage insurance policy

Travel insurance policy

Property & casualty policy

# Personal & Charitable Trusts

	PROVIDER	LOCATION OF DOCUMENT
Personal trust accounts		
Trustee information		
Charitable accounts		
Charitable donation preferences		