

ORGANIZE YOURSELF

Believe it or not, a key step toward protecting your financial life is to organize it. This worksheet is a good place to start. Complete this "executive summary" of key details, put it in a safe place, and make sure your loved ones either have a copy or know how to put their hands on one if it's needed.

Emergency Contact Info	Personal Contact	Employer Contact
Name:		
Street Address:		
City, State, Zip:		
Phone:		
E-mail:		

Banks

Bank Name	Checking Account Number	Savings Account Number	Location of Statements	Login for Online Banking

Loans

Bank Name	Account Number	Monthly Payment	Due Date	Location of Statements

Credit Cards

Issuer Name	Account Number	Payment Due Date	Location of Statements

Investments

Financial Institution	Type of Investment	Account Number	Location of Statements

Insurance Policies

Company/Agent	Type of Policy	Premium Due Date	Policy Number	Location of Policy

Legal Information

	Location, including additional information such as the executor or attorney
Will	
Power of Attorney	
Passport	
Marriage Certificate	
Divorce/Separation Papers	