

Liquid Assets *(cash or equivalent)*

Location, Account Number, Contact

Cash on Hand	_____
Checking Account(s)	_____
_____	_____
_____	_____
Savings Account(s)	_____
_____	_____
_____	_____
Savings Bonds	_____
_____	_____
_____	_____
Money Market Funds	_____
_____	_____
_____	_____
Certificates of Deposit	_____
Life Insurance Policies	_____

Item	Policy 1	Policy 2	Policy 3
Policy Number	_____	_____	_____
Name of Company	_____	_____	_____
Issue Age	_____	_____	_____
Insured	_____	_____	_____
Owner of Policy	_____	_____	_____
Type of Policy	_____	_____	_____
Annual Premium	_____	_____	_____
Current Cash Value	_____	_____	_____
Extra Benefits	_____	_____	_____
Loan Outstanding	_____	_____	_____
Net Payable at Death	_____	_____	_____

Assembling Important Papers

The following papers are important to you now as well as in the future. For example, what happens in the event of death? What happens in the event of fire or theft? Who needs to know? Check the following lists to see how safe your essential records are and where they are located.

Safe Deposit Box	Other Home File	Locations (Specify)	Personal
_____	_____	_____	Original birth certificates with extra copies
_____	_____	_____	Baptismal certificates
_____	_____	_____	Marriage, adoption, and divorce papers
_____	_____	_____	Citizenship papers/Green card
_____	_____	_____	Discharge papers
_____	_____	_____	Change of name – legalization papers
_____	_____	_____	Photos of entire family
_____	_____	_____	School records, diplomas
_____	_____	_____	Passports
_____	_____	_____	Resume or personal history
_____	_____	_____	Social Security numbers/earnings statements
_____	_____	_____	Memorial/funeral service instructions
_____	_____	_____	Burial/cremation instructions
_____	_____	_____	Living wills
_____	_____	_____	Power of attorney and healthcare power of attorney
_____	_____	_____	Original copy of will
_____	_____	_____	Copies of will
_____	_____	_____	Names and addresses of children
_____	_____	_____	Computer passwords
_____	_____	_____	Financial planner information
_____	_____	_____	Web pages codes and personal ID

