



**Personal Records**

*A form to help you keep track of your loved one's personal records and other important information.*

**Personal Records and Important Documents of**

*(your loved one's name)*

**Last Will and Testament**

Location: \_\_\_\_\_  
Attorney's name/Phone No.: \_\_\_\_\_

**Doctors:**

Primary Care-Name/Phone No.: \_\_\_\_\_

**Other Specialists:**

Name/Phone No.: \_\_\_\_\_  
Name/Phone No.: \_\_\_\_\_

**Social Security Number:**

\_\_\_\_\_ Contact regarding information and benefits: \_\_\_\_\_

**Insurance Policies:**

Location: \_\_\_\_\_

| Name of Ins Co. | Phone No. | Policy No. | Beneficiary | Value |
|-----------------|-----------|------------|-------------|-------|
|                 |           |            |             |       |
|                 |           |            |             |       |
|                 |           |            |             |       |

**Burial Policy/Funeral Plan.**

Location: \_\_\_\_\_  
Contact/Phone No.: \_\_\_\_\_

**Cemetery Property**

Ownership certificate location: \_\_\_\_\_

**Birth Certificate**

Location: \_\_\_\_\_  
Name on Certificate: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ City/County: \_\_\_\_\_ State: \_\_\_\_\_  
Father's Name: \_\_\_\_\_  
Mother's Name: \_\_\_\_\_

**Marriage License**

Location: \_\_\_\_\_

Wedding: \_\_\_\_\_ City/County: \_\_\_\_\_ State \_\_\_\_\_

**Divorce Records**

Location: \_\_\_\_\_  
Attorney's Name/Phone: \_\_\_\_\_

**Military Records**

Location: \_\_\_\_\_  
Military ID No.: \_\_\_\_\_ Veterans Benefits/Info.: \_\_\_\_\_  
Military Retirement Benefits (Branch of Military Contact Phone No.): \_\_\_\_\_

**Assets:**

**Checking, Savings, CD Accounts**

|          | Account Number | Name on Account | Branch Location |
|----------|----------------|-----------------|-----------------|
| Checking |                |                 |                 |
| Checking |                |                 |                 |
| Savings  |                |                 |                 |
| Savings  |                |                 |                 |
| CDs      |                |                 |                 |

**Safe Deposit Box**

Location: \_\_\_\_\_  
Key Location: \_\_\_\_\_  
Contents: \_\_\_\_\_

**Retirement, 401(k) and/or IRA Documents**

Contact/Phone No.: \_\_\_\_\_  
Contact/Phone No.: \_\_\_\_\_

**Investments—Stocks and Bonds**

Location: \_\_\_\_\_

**Deed to House/Other property and Mortgage Info**

Location: \_\_\_\_\_  
Mortgage Co. Name/Policy No.: \_\_\_\_\_  
Contact/Phone No.: \_\_\_\_\_

**Automobile Ownership**

Title(s) Location: \_\_\_\_\_

| Vehicle ID No. | Year | Make | Model |
|----------------|------|------|-------|
|                |      |      |       |
|                |      |      |       |

**Other Vehicle (truck, motor home, boat)**

Title(s) Location: \_\_\_\_\_

| Vehicle ID No. | Year | Make | Model |
|----------------|------|------|-------|
|                |      |      |       |
|                |      |      |       |

**Other Assets**

Description: \_\_\_\_\_  
Location of Important Documents: \_\_\_\_\_

**Debts**

**Credit Cards**

Location: \_\_\_\_\_

| Credit Card Co. | Name on Account | Account No. | Contact Phone No. |
|-----------------|-----------------|-------------|-------------------|
|                 |                 |             |                   |
|                 |                 |             |                   |
|                 |                 |             |                   |

**Loans**

| Type of Loan | Contact Phone No. | Documents Located |
|--------------|-------------------|-------------------|
|              |                   |                   |
|              |                   |                   |
|              |                   |                   |

**Tax Records**

Location: \_\_\_\_\_

Accountant's Name/Phone No.: \_\_\_\_\_

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