



PERSONAL FINANCIAL ORGANIZER

Personal Profile (include Children & Other Beneficiaries)

NAME	SOCIAL SECURITY NO.	DATE OF BIRTH
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Do you have?

	CURRENT & DATED	LOCATION
Will		
Durable Power of Attorney	CURRENT & DATED	LOCATION
Health Care Directive	CURRENT & DATED	LOCATION
Living Will	CURRENT & DATED	LOCATION
Revocable Living Trust	CURRENT & DATED	LOCATION
Other Trusts	CURRENT & DATED	LOCATION
Personal Representative/Executor	CURRENT & DATED	LOCATION



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Do you have?

	CURRENT & DATED	LOCATION
Successor Trustee		
	CURRENT & DATED	LOCATION
Tax Returns		
	CURRENT & DATED	LOCATION
Safety Deposit Box		
	CURRENT & DATED	LOCATION
Keys		
	CURRENT & DATED	LOCATION
Contents of Safety Deposit Box		
	CURRENT & DATED	LOCATION
Appraisal and inventory of personal property (list, photos)		
	CURRENT & DATED	LOCATION
Real Estate Deeds		
	CURRENT & DATED	LOCATION
Divorce decree/prenuptial agreement/child's support		
Bank Accounts		
INSTITUTION / TITLED AS	TYPE OF ACCOUNT	ACCOUNT NO.
INSTITUTION / TITLED AS	TYPE OF ACCOUNT	ACCOUNT NO.
INSTITUTION / TITLED AS	TYPE OF ACCOUNT	ACCOUNT NO.
INSTITUTION / TITLED AS	TYPE OF ACCOUNT	ACCOUNT NO.



PERSONAL FINANCIAL ORGANIZER

Trust Accounts

INSTITUTION

ADDRESS

TYPE OF TRUST

TAX ID NUMBER

CURRENT TRUSTEE

SUCCESSOR TRUSTEE

BENEFICIARIES

INSTITUTION

ADDRESS

TYPE OF TRUST

TAX ID NUMBER

CURRENT TRUSTEE

SUCCESSOR TRUSTEE

BENEFICIARIES

Securities

INVESTMENT FIRM

TYPE OF ACCOUNT

ACCOUNT NO.

INVESTMENT FIRM

TYPE OF ACCOUNT

ACCOUNT NO.

INVESTMENT FIRM

TYPE OF ACCOUNT

ACCOUNT NO.



PERSONAL FINANCIAL ORGANIZER

IRAs / Retirement Plans

Traditional IRA	Roth IRA	Qualified Plan	403(b)
PARTICIPANT			
INVESTMENT FIRM		ACCOUNT NO.	APPROXIMATE VALUE
PRIMARY BENEFICIARIES		CONTINGENT BENEFICIARIES	

Traditional IRA	Roth IRA	Qualified Plan	403(b)
PARTICIPANT			
INVESTMENT FIRM		ACCOUNT NO.	APPROXIMATE VALUE
PRIMARY BENEFICIARIES		CONTINGENT BENEFICIARIES	

Traditional IRA	Roth IRA	Qualified Plan	403(b)
PARTICIPANT			
INVESTMENT FIRM		ACCOUNT NO.	APPROXIMATE VALUE
PRIMARY BENEFICIARIES		CONTINGENT BENEFICIARIES	



PERSONAL FINANCIAL ORGANIZER

Life Insurance Policies

OWNED BY	TYPE OF POLICY	ISSUER
INSURED	BENEFICIARY	DEATH BENEFIT
PREMIUM	CASH VALUE	LOANS OUTSTANDING
LOCATION OF POLICIES		

OWNED BY	TYPE OF POLICY	ISSUER
INSURED	BENEFICIARY	DEATH BENEFIT
PREMIUM	CASH VALUE	LOANS OUTSTANDING
LOCATION OF POLICIES		

Annuities

OWNED BY	TYPE OF CONTRACT	ISSUER
BENEFICIARY	DEATH BENEFIT	CASH VALUE

OWNED BY	TYPE OF CONTRACT	ISSUER
BENEFICIARY	DEATH BENEFIT	CASH VALUE



PERSONAL FINANCIAL ORGANIZER

Real Estate

TYPE OF PROPERTY

OWNED BY (TITLED)

LOCATION OF PROPERTY

LENDER

MORTGAGE ACCOUNT

LENDER'S ADDRESS

TYPE OF PROPERTY

OWNED BY (TITLED)

LOCATION OF PROPERTY

LENDER

MORTGAGE ACCOUNT

LENDER'S ADDRESS

Online Accounts

It could be very important for your executor, trustee, attorney-in-fact, or a trusted family member to gain access to information from your computer, phone or online accounts.

LOCATION OF PASSWORDS

Consider keeping a copy of this organizer with your estate planning documents.