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&

ASSOCIATES

What you need to
know when I am gone

Template: Fill in your information

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Personal Information

Full Legal Name:

Maiden Name:

Any additional names:

Birthday:

Birth Place:

Social Security Number:

Current Address:

Location of Residence Key and copies:

Prior Addresses:

P.O. Box:

Location of P.O. Box Key:

Home phone number:

Cell Phone number:

Passcode:

Other phone numbers:

Email:

Login Website and password:

Two-Factor Authentication:

Safe Location and Combination:

Insurance:

Car Insurance

Agent Name and Phone number:

Vehicle Make and Model:

Location of Title Documents:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Agent Name and Phone number:

Vehicle Make and Model:

Location of Title Documents:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Life Insurance:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Face Amount:

Beneficiaries and Percentages:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Face Amount:

Beneficiaries and Percentages:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Health Insurance:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Home Insurance:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Long-Term Care Insurance:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Other Insurance:

Agent Name and Phone number:

Company:

Policy Number(s):

Location of Policy:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Additional Information:

Important Documents

Will/Trust:

Most Recent Executed Date:

Location:

Executors/Successor Trustees:

Name:

Address:

Phone Number:

Email:

Name:

Address:

Phone Number:

Email:

Power of Attorney:

Health Care:

Document Location:

Dated:

Conservatorship:

Document Location:

Dated:

Advance HealthCare Directive:

Document Location:

Dated:

Birth Certificate Location:

Marriage Certificate:

Date of Marriage:

Document Location:

Divorce Decree (if applicable):

Document Location:

Dated:

Driver's License:

Number:

Expiration Date:

Location:

Passport:

Number:

Expiration Date:

Location:

Attorney Contact Information:

Name:

Address:

Phone Number:

Email:

Website:

Additional Details:

Name:

Address:

Phone Number:

Email:

Website:

Additional Details:

CPA Contact Information:

Name:

Address:

Phone Number:

Email:

Website:

Additional Details:

Name:

Address:

Phone Number:

Email:

Website:

Additional Details:

Where are previous tax returns located?

Financial Information

Financial Documents Location:

Bank Accounts

Bank Name:

Address:

Phone Number:

Account Number:

Type of Account:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Bank Name:

Address:

Phone Number:

Account Number:

Type of Account:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Bank Name:

Address:

Phone Number:

Account Number:

Type of Account:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Mortgage:

Bank Name:

Address:

Phone Number:

Account Number:

Type of Account:

Location of Deed:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Bank Name:

Address:

Phone Number:

Account Number:

Type of Account:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Credit Card:

Issuer:

Number:

Limit:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Issuer:

Number:

Limit:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Issuer:

Number:

Limit:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Loans:

Loan Provider:

Address:

Phone Number:

Account Number:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Loan Provider:

Address:

Phone Number:

Account Number:

Statements: Paperless or Mailed

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Investments

Account Type:

Account Number:

Statements: Paperless or Mailed

Advisor Name:

Advisor Address:

Advisor Email:

Advisor Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Beneficiaries:

-
-
-
-
-

Account Type:

Account Number:

Statements: Paperless or Mailed

Advisor Name:

Advisor Address:

Advisor Email:

Advisor Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Beneficiaries:

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-
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-
-

Account Type:

Account Number:

Statements: Paperless or Mailed

Advisor Name:

Advisor Address:

Advisor Email:

Advisor Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Beneficiaries:

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-
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Account Type:

Account Number:

Statements: Paperless or Mailed

Advisor Name:

Advisor Address:

Advisor Email:

Advisor Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method

Beneficiaries:

-
-
-
-

-

Pension:

Survivor Benefit: Yes or No

Payment date:

Where does income go?

Properties

Primary Residence Address:

Alarm Code:

Key Location:

Do you own it or rent?

If rented:

Landlord Name:

Phone Number:

Mailing Address:

Payment Amount and Method:

Documents Related to property:

Additional Properties:

Address:

Type of Property:

Copy of Keys are located:

Alarm Pin:

Tenant Name:

Tenant Phone Number:

Tenant Email:

Method of Payment:

Rent Due:

Rental Agreement Location:

Additional Details:

Address:

Type of Property:

Copy of Keys are located:

Tenant Name:

Tenant Phone Number:

Tenant Email:

Method of Payment:

Rent Due:

Rental Agreement Location:

Address:

Type of Property:

Copy of Keys are located:

Alarm Pin:

Tenant Name:

Tenant Phone Number:

Tenant Email:

Method of Payment:

Rent Due:

Rental Agreement Location:

Utilities:

Electricity

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Gas

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Water

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Internet

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Sewer

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Garbage

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Landline

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Cell Phone:

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Cable:

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Alarm Company

Alarm Pin:

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Business Alarm Pin:

Company Name:

Phone Number:

Online Access Website Link:

Online Access Username:

Online Access Password:

Security Questions and Answers:

Two-Factor Authentication Method:

Subscriptions:

Netflix:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Hulu:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Amazon:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Apple:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Google Pay:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

YouTube:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Disney+:

Website

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Magazine:

Website/Address:

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Newspaper:

Website/Address:

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

SiriusXM:

Website/Address:

Username:

Password:

Two-Factor Authentication Method:

Payment Method:

Payment Due:

Dependents and Pets

Dependent Name:

Date of Birth:

Location of their important documents:

Guardian:

Phone Number:

Address:

Email:

Doctor:

Phone Number:

Address:

Email:

Dentist:

Phone Number:

Address:

Email:

Additional Information:

Dependent Name:

Date of Birth:

Guardian:

Phone Number:

Address:

Email:

Doctor:

Phone Number:

Address:

Email:

Dentist:

Phone Number:

Address:

Email:

Additional Information:

Pet Name:

Breed:

Date of Birth and Age:

Location of their important documents:

Guardian:

Phone Number:

Address:

Email:

Veterinary:

Address:

Phone Number:

Email:

Additional Information:

Pet Name:

Breed:

Date of Birth and Age:

Location of their important documents:

Guardian:

Phone Number:

Address:

Email:

Veterinary:

Address:

Phone Number:

Email:

Additional Information:

Pet Name:

Breed:

Date of Birth and Age:

Location of their important documents:

Guardian:

Phone Number:

Address:

Email:

Veterinary:

Address:

Phone Number:

Email:

Additional Information: