

ESSENTIAL INFORMATION ORGANIZER

A Comprehensive Fill-in-the-Blank Guide to Help
Your Loved Ones Access Critical Details When They
Need It Most

Legal Name:

EMERGENCY CONTACTS

NAME	RELATIONSHIP	PHONE	EMAIL	ROLE <small>(e.g., executor, physician)</small>	NOTES
1					
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4					
5					
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FINANCIAL ACCOUNTS

	INSTITUTION	ACCOUNT TYPE	ACCOUNT #	BENEFICIARY(IES)	NOTES
1					
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FINANCIAL ACCOUNTS, cont'd

	INSTITUTION	ACCOUNT TYPE	ACCOUNT #	BENEFICIARY(IES)	NOTES
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INSURANCE POLICIES

	COMPANY	POLICY TYPE	POLICY #	COVERAGE INFO	BENEFICIARY(IES)	NOTES
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BILLS & SUBSCRIPTIONS

	COMPANY	ACCOUNT #	AMOUNT	PAID FROM	LOGIN INFO	NOTES
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BILLS & SUBSCRIPTIONS, cont'd

	COMPANY	ACCOUNT #	AMOUNT	PAID FROM	LOGIN INFO	NOTES
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ONLINE ACCOUNTS

	PLATFORM	USERNAME	PASSWORD	2 FACTOR METHOD	NOTES
1					
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LEGAL DOCUMENTS

	DOCUMENT TYPE	LOCATION	DATE CREATED / UPDATED	NOTES
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MISC / NOTES

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