

# Keeping a Log of Personal Assets

Maintaining a list of your personal assets is critical to record keeping and estate planning. This section gives you one central location for information regarding your assets and financial records, including:

- ✓ **Bank accounts**
- ✓ **Investment accounts**
- ✓ **Insurance policies**
- ✓ **Employment benefits (including 401(k) accounts)**
- ✓ **Personal property**

Use the Online Access section of this booklet to keep track of online login information for these accounts.

## Safe deposit box inventory

Included in this section is space to record the contents of a safe deposit box. If you don't have a safe deposit box, consider getting one. The yearly rental is inexpensive and may be tax deductible.

Use your safe deposit box to store items that would be difficult, costly or impossible to replace. The worksheet in this section provides some recommendations. Keep in mind that a safe deposit box is often sealed

upon the death of the owner, so avoid keeping the only copy of your will, living will or other items your executor might need in the box.

# Financial Records

**EMPLOYMENT BENEFITS**

Remember to include former employers' 401(k)s, 403(b)s, pensions, and other benefits that may apply.

Name	Benefit type	Phone number	Employer	Account number	Location of records

**INSURANCE POLICIES** (Homeowners)

Company	Policy number	Phone number	Contact	Location of property	Location of policy

# Financial Records

## **INSURANCE POLICIES** (Medicare)

ID Number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Medical/Supplemental)

Company	Policy number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Disability)

Company	Policy number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Dental)

Company	Policy number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Vision)

Company	Policy number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Long-Term Care)

Company	Policy number	Phone number	Contact	Location of policy

## **INSURANCE POLICIES** (Critical Illness)

Company	Policy number	Phone number	Contact	Location of policy

# Records of Property

**RENTALS** (Post office box, storage unit, etc.)

Renter	Phone number	Rental type	Location of policy

**HOME MORTGAGE**

Mortgage holder	Phone number	Location of records	Date of mortgage

**OTHER PROPERTY**

Owner on deed	Phone number	Location of records	Date of deed

**VEHICLES**

Make/model/year	Vehicle ID number	Location of title	Location of registration	Location of maintenance records



# Records of Property

## SAFE DEPOSIT BOX

Location of box	Authorized signers on box
Box number	Location of key

Item	Date added	Date removed
Automobile registrations		
Birth certificates		
Citizenship papers		
Coins, gold, silver		
Computer data backup		
Death certificates		
Deeds		
Divorce decrees		
Jewelry		
Marriage certificates		
Passport		
Stock certificates/bonds		
Titles		
Veteran's papers		

## OTHER

Item	Date added	Date removed