



# LIFE & FINANCIAL ORGANIZER

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This organizer helps you keep all your essential financial, personal, and estate information in one place. It's designed to support confident planning, simplify life for your loved ones, and provide confidence - now and in the future.

Remember to update it regularly and share its location with someone you trust.



# ABOUT ACCEL WEALTH MANAGEMENT

At Accel Wealth Management, we believe that confidence comes from preparation. Life is full of milestones and transitions—some expected, others not. This organizer is designed to bring clarity, order, and confidence to your financial life by keeping all of your essential information in one place.

Whether you're planning for retirement, navigating a major life event, or simply keeping your affairs in order, this binder serves as a central resource for you, your family, and your trusted advisors.

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Inside, you'll find space to document personal and family details, financial accounts, estate plans, professional contacts, insurance coverage, and more. Our goal is to empower you to make informed decisions and ensure your loved ones have access to what they need, when they need it most.

Thank you for allowing Accel Wealth Management to be your trusted partner on your financial journey. We're here to guide, support, and help you live with greater confidence - today and into the future.

**Let's get started.**



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# CONTACTS & INFORMATION

PERSONAL & PROFESSIONAL

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Centralize your key personal, family, and trusted professional contact information in one place for easy access and quick reference when you need it most.



## Personal Details

Instructions: Provide your personal information for each section

Field	Information
Full Legal name	
Date of Birth	
Social Security #	
Phone #	
Email Address	
Current Address	
Birth City	
Marital Status	
Driver's License #	
State of Issue	
Expiration Date	

## Spouse/Partner Details

Instructions: Provide your spouse's/partner's personal information for each section

Field	Information
Full Legal name	
Date of Birth	
Social Security #	
Phone #	
Email Address	
Current Address	
Birth City	
Marital Status	
Driver's License #	
State of Issue	
Expiration Date	

## Personal Details

Instructions: Provide your personal information for each section

### Family

Father's Name:\_\_\_\_\_ Father's Place of Birth:\_\_\_\_\_

Mother's Name:\_\_\_\_\_ Mother's Place of Birth:\_\_\_\_\_

Brothers and Sisters:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Military Record

Date and Place of Induction:\_\_\_\_\_

Date and Place of Discharge:\_\_\_\_\_

Branch of Service:\_\_\_\_\_

Rank at Discharge:\_\_\_\_\_

Decorations, if any:\_\_\_\_\_

### Current Employer

Name:\_\_\_\_\_

Address:\_\_\_\_\_

\_\_\_\_\_

Employee Benefits?  Yes  No    Death or Retirement Benefits?  Yes  No

### Past Employers

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

## Spouse's Personal Details

Instructions: Provide your spouse's personal information for each section

### Family

Father's Name:\_\_\_\_\_ Father's Place of Birth:\_\_\_\_\_

Mother's Name:\_\_\_\_\_ Mother's Place of Birth:\_\_\_\_\_

Brothers and Sisters:

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### Military Record

Date and Place of Induction:\_\_\_\_\_

Date and Place of Discharge:\_\_\_\_\_

Branch of Service:\_\_\_\_\_

Rank at Discharge:\_\_\_\_\_

Decorations, if any:\_\_\_\_\_

### Current Employer

Name:\_\_\_\_\_

Address:\_\_\_\_\_

Employee Benefits?  Yes  No    Death or Retirement Benefits?  Yes  No

### Past Employers

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_

Occupation:\_\_\_\_\_ from:\_\_\_\_\_ to:\_\_\_\_\_







# FINANCIAL ACCOUNTS

## ASSETS & LIABILITIES

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This section offers a clear snapshot of your financial position by organizing details about your bank accounts, investments, retirement savings, and digital assets. It also captures income sources and outlines any outstanding debts or monthly obligations. Keeping this information up to date ensures accurate financial planning and helps family members or advisors manage your affairs effectively in your absence.





## Investment Accounts (401(k), IRA, Roth, etc.)

Instructions: Provide any retirement account information.

Institution	Account Type	Account #	Owner(s)	Username	Password	Phone Number

## Health Savings & Flexible Spending Accounts (HSA/FSA)

Instructions: Provide any HSA or FSA Account information.

Provider	Account Type	Account #	Owner(s)	Balance	Contact Info

## College Savings Accounts (529 Plans, Custodial, etc.)

Instructions: Provide any school or college savings accounts.

Institution	Account Type	Account #	Owner(s)	Beneficiary	Username	Password	Contact Info

## Cryptocurrency or Digital Assets

Instructions: Provide any cryptocurrency or digital asset information.

Platform/Wallet	Type of Asset	Amount	Wallet Key Location	Notes

## Safe Deposit Box

Instructions: Provide any safe deposit box location information.

Bank Name	Box Number	Location	Key Location	Contents Summary



# INSURANCE COVERAGE

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This section consolidates all of your insurance policies in one place, including life, health, disability, long-term care, home, auto, and umbrella coverage. It provides essential policy details, beneficiary designations, premium information, and renewal dates to make managing protection plans easier and ensure that loved ones can quickly access the coverage they may need.



## Life Insurance

Instructions: Use this log to track any life insurance policy information

Insurance Company	Policy #	Death Benefit	Issue Date	Renewal / Expiration Date	Beneficiary(ies)

## Health Insurance

Instructions: Use this log to track any health insurance policy information

Insurance Company	Policy #	Phone	Username	Password

## Disability Insurance

Instructions: Use this log to track any disability insurance policy information

Insurance Company	Policy #	Phone	Username	Password

## Long-Term Care Insurance

Instructions: Use this log to track any long-term care insurance policy information

Insurance Company	Policy #	Phone	Username	Password

## Auto Insurance

Instructions: Use this log to track any auto insurance policy information

Insurance Company	Policy #	Phone	Username	Password

## Homeowners/Renters Insurance

Instructions: Use this log to track any homeowners/renters insurance policy information

Insurance Company	Policy #	Phone	Username	Password

## Important Reminders

Instructions: Use this log to track any important reminders

Reminder	Date(s)	Notes
Upcoming Renewal Dates		
Open Enrollment Periods		
Beneficiary Review Schedule		

## Emergency Contact List

Instructions: Use this log to track any emergency contacts

Type	Name	Phone Number	Email Address	Company
Insurance Agent (s)				
Financial Advisor				
Attorney				
Executor/Trustee				

## Annual Insurance Review Checklist

- Any new assets needing coverage?
- Are any policies underperforming or overpriced?
- Have premium payments changed?
- Are beneficiaries still accurate?



# ANNUITY POLICIES

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This section is designed to help you track and organize all annuity contracts you own. Keeping this information current ensures your financial plan is complete and helps your loved ones and advisors manage your affairs if needed.



## Annuity Policy Summary

Instructions: Use this log to track any annuity policy information

Institution/ Provider	Type (Fixed, Variable, Indexed, Immediate, Deferred)	Contract/ Policy #	Issue Date	Start Date (if deferred)	Payout Option (Lifetime, Period Certain, Lump Sum, etc.)	Beneficiary(ies)	Contact Info

## Annuity Details & Notes

Use this space to capture additional information, such as:

- Surrender value and penalties
- Annual fees or charges
- Riders or special provisions
- Income start age or date
- Tax status (Qualified/Non-Qualified)

## Annual Review Checklist

- Contract copy stored with this binder
- Income start date confirmed and documented
- Beneficiary information reviewed and current
- Annual review completed with financial advisor
- Contact details for provider or representative noted



# REAL ESTATE & OTHER ASSETS

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This section documents your tangible assets, including real estate properties, vehicles, valuable personal property, and other significant holdings. By listing details such as ownership, location, value, and associated documents, you create a complete inventory that supports estate planning, insurance coverage, and future financial decisions.



## Real Estate Holdings

Instructions: Use this log to track any real estate property information

Property Address	Type (Primary, Vacation, Rental, etc)	Legal Owner(s)	Purchase Date & Price	Mortgage Details	Property Insurance Details	Location of Deed & Title	Notes (Rental income, Co-owners, etc.)

## Vehicles

Instructions: Use this log to track any vehicle information

Make / Model / Year / VIN	Owner(s)	Purchase Date & Price	Current Value	Loan or Lease information	Insurance Details	Location of Policy Documents

## Valuable Personal Property

Instructions: Use this log to track any other personal property information

Item Description (Jewelry, Art, etc)	Estimated Value	Owner(s)	Appraisal Date	Insurance Coverage Info	Location of Item

## Other Significant Assets

Instructions: Use this log to track any real estate property information

Type (Boats, RVs, Equipment)	Description	Legal Owner(s)	Purchase Date & Price	Current Value	Insurance Documents	Location or Storage Info	Notes

### Notes for Real Estate and Asset Information:



# ESTATE PLANNING

AND AFTER-DEATH WISHES

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This section organizes your key estate planning documents—such as wills, trusts, and powers of attorney—and outlines your final wishes. It ensures your plans are clearly documented, legally sound, and easily accessible to your loved ones and advisors, helping reduce confusion and stress during difficult times.







# Funeral or Burial Instructions

Instructions: Use this space to include your preferences for funeral or memorial services, burial or cremation, location, religious or cultural wishes, and any pre-arranged plans.

## General Preferences

Do you prefer a funeral, memorial service, celebration of life, or no service?

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Name of preferred officiant, pastor, or speaker.

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## Disposition of Remains

Do you prefer burial, cremation, donation to science, or other?

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If cremated, where would you like your ashes to be kept, scattered, or buried?

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If buried, do you already have a burial plot? If so, where?

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Do you want to be buried next to a spouse or family member?

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## Service Details

Location of funeral or memorial service (church, funeral home, other):

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Any specific readings, poems, prayers, or scripture you want included?

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Do you want music played? If so, which songs/artists?

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Any eulogists you'd like to speak?

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Do you have a preference for open or closed casket?

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Any personal items you'd like displayed or included in the service?

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Charities or causes to donate to in lieu of flowers?

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## Guardianship Designations (for Minor Children)

Instructions: Use this space to write in preferred guardians of any minors.

**Name of Guardian(s):**

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**Alternate Guardian(s):**

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## Digital Assets and Passwords Inventory

Instructions: Use this space to track your key digital accounts, login information, and storage locations. Consider using a password manager or secure vault.

Platform/Device	Username	Password	URL
Facebook			
Email			
Computer			
Cell Phone	X		

### Essential Documents Checklist

- Last Will and Testament
- Living Trust/Revocable Trust
- Durable Power of Attorney
- Healthcare Power of Attorney
- Living Will/Advance Directive
- HIPAA Authorization
- Guardianship Designations
- Funeral or Burial Instructions
- Letter of Intent
- Digital Assets/Passwords Inventory
- List of Advisors

### Location of Documents

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# ANNUAL REVIEW

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This section helps you keep your financial information up to date by tracking regular reviews. Use it to log updates, record conversations with your financial advisor, and set goals or action steps. Reviewing your organizer annually ensures that everything remains accurate and aligned with your financial plans and life changes.



## Annual Review Log

Instructions: Use this log to track when you reviewed and updated this binder.

Review Date	Reviewed By	Sections Updated	Summary of Changes	Next Review Date

## Notes from Financial Advisor

Advisor Name: \_\_\_\_\_

Meeting Date: \_\_\_\_\_

## Goals & Action Items

Annual Financial Goals:

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Action Items:

Task	Responsible Party	Target Date	Completed

## Date of Last Review Per Section

Section	Reviewed By
Personal & Family Information	
Financial Accounts	
Income & Employment	
Insurance	
Legal & Estate	
Property & Assets	
Debts & Liabilities	
Funeral & Final Wishes	
Key Contacts	
Annual Review	

## Annual Review Checklist

- Reviewed and updated personal/family information
- Verified all financial accounts and beneficiaries
- Updated employment and income sources
- Confirmed insurance coverage is adequate
- Reviewed legal and estate documents with attorney
- Updated list of properties and real estate
- Recorded new liabilities or paid-off debts
- Reviewed funeral and final wishes
- Updated key contact information
- Met with financial advisor and set new goals
- Scheduled next annual review



# LET'S WORK TOGETHER

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