

IMPORTANT LIFE INFORMATION & DOCUMENT ORGANIZER

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	Personal	Where is original stored? Where is the copy?
	Maryland MVA Emergency Contact Registry? Name, Addresses, Phone Numbers	
	Education (certificates, degrees)	
	Employment and Retirement Records	
	Military Records	
	Family Genealogy (family tree)	
	Home Records (locks, keys, mortgage, deed, inventory, photos of major household items)	
	Legal Documents (Lawyer's contact info)	
	Medical Records (blood type, prescriptions, allergies, doctor, hospital, medical directive)	
	Safe Deposit Box (contents, key holder)	
	Vital Records	Where is original stored? Where is the copy?
	Voter registration, <i>copies</i> of marriage license, birth or death certificate of spouse or children, divorce papers, social security card, organ donor card, pre-arranged funeral information, military discharge record, passport #	

Name: _____

Last Updated: _____

	Financial	Where is original stored? Where is the copy?
	Bank Account (checking # / savings #) copy of signature card, PIN #	
	Credit Cards and phone number of companies	
	Household Bills / Loans	
	Estate Planning, Power of Attorney List of Assets (valuables), Lawyer	
	Financial Planning List of Assets, Financial Planner	
	Income Records (1099, W-2, interest income)	
	Investments 401(k), mutual funds, CDs, stocks Investment Advisor	
	Loans and agreements	
	Mortgage Company	
	Retirement Plan (annuity, IRA, etc.)	
	Savings (bonds, employer plan)	
	Social Security Earnings	
	Utilities: Phone, TV, Internet, Cell Company phone #s	
	Utilities: Water, gas, electric, emergency tel #s	

	Motor Vehicle Records	Where is original stored? Where is the copy?
	Copy of title, registration, purchase or sales record, Auto Club, Motorcycle, Boat)	
	Taxes & Insurance	Where is original stored? Where is the copy?
	Income Tax Records	
	Disability Insurance, Agent's contact info	
	Medical/Dental Insurance, Agent's info	
	Medicare	
	Homeowner's Insurance, policy #	
	Life Insurance, Agent's info	
	Mortgage Insurance	
	Property Taxes & Assessment	
	Vehicle Insurance, policy #, Agent's Info	
	Lifestyle	Where is original stored? Where is the copy?
	Computer accounts, records, passwords	
	Pet's description, name, photo, shot records, veterinarian info	
	Religious Records (place of worship, clergy)	
	Social & Exercise Clubs	
	Membership Associations / Organizations	