

Personal Organizer

Attached are charts to assist you in compiling information in one place for ease of management and as a convenient source of information in case of damage or destruction to your personal documents. Therefore, keep a copy in a file at home, in your safe deposit box, in your strong box and/or other safe place and give a backup copy to a trusted person. The effort you make now when time is not rushed will come back to you tenfold when the need arises to refer to the chart for information. The value of this resource to you will be immediately appreciated with its first use, even if it is your one and only use of the information. Just ask someone who has suffered a catastrophe or casualty how invaluable it is to have the information cumulated in one document and stored in a safe place.

The charts will also be an invaluable source of information for your spouse, children or other loved ones in managing your affairs or establishing your estate. It would therefore be important to either give a copy to your executor or loved one, or let them know where your copy is stored. The value of this list for those administering your affairs or handling your estate cannot be overstated. Without this list, untold hours of time will be extended and unnecessary expenses will be incurred. By keeping this list you are letting your loved ones know you value their assistance and time they will devote to you and on your behalf.

You should review this information periodically for accuracy. It is advisable to maintain a blank copy of the form for future use.

The chart will summarize your assets, debts, advisors, and location of important documents. So, take a few minutes to make an extra copy or copies of the form and gather the information before starting to fill in the chart.

After completing the chart, evaluate whether you have stored your source documents in a safe place to account for flooding, fire, theft or other type of destruction.

MY PERSONAL INFORMATION

Name: _____ Address: _____

Mother's Name: _____ Father's Name: _____

Soc. Sec. No.: _____ Birth Date: _____ Birth Place: _____

Financial Accounts

Type of Account	Name of Financial Advisor/ Type of Account	Bank/Financial Company	Account Number
Bank Account			
Bank Account			
Bank Account			
Mutual Fund			
Stock Account			
U.S. Savings Bonds			
Annuity			

Debts

Type of Account	Name of Creditor	Account Number
Credit Card		
Credit Card		
Credit Card		
Mortgage/Landlord		
Car Note		
Car Note		

Retirement Accounts

Type of Account	Name of Company/Bank	Account Number
Retirement		
Retirement		
IRA		
IRA		

Monthly Expenses

Type of Account	Name of Creditor	Account Number	Due date each month
Electricity			
Gas-Home			
Cable			
Insurance draft			
Insurance draft			
Insurance draft			
Car Note			
Car Note			
Telephone			
Mortgage			
Credit Card			
Credit Card			
Credit Card			

Insurance Coverages

Type of Insurance	Name of Insurance Co.	Policy Number	Due Dates and Amount
Home Insurance			
Flood Insurance			
Renters Insurance			
Car Insurance			
Car Insurance			
Life Insurance			
Life Insurance			
Health Insurance			
Disability Insurance			
Personal Property			
Long Term Care			

To contact in case of emergency

Relationship	Name	Telephone Number
Spouse or Partner		
Child		
Child		
Child		
Attorney		
Financial Advisor		
Employer		
Friend		
Other Relative		
Doctor		
Neighbor		
Business Partner		

Location of Important Papers

Type of Document	Location	Description
Power of Attorney-General		
Power of Attorney-Medical		
Will		
Living Will		
Organ Donation		
Burial Policy/Instructions		
Cemetery Plot		
Succession documents for deceased spouse, child or parent.		
Trust		
Income Tax Returns		
Insurance Policy		
Insurance Policy		
Insurance Policy		

Location of Important Papers (cont'd)

Type of Document	Location	Description
Social Security Card		
Passport		
Medical Card		
Medical Card		
Drivers License		
Business Contract		
Business Contract		
Military Service Document		
Military Service Document		
Marriage Certificate		
Divorce Papers		
Prenup/Marriage Contract		
Unused credit cards		
Warranties		
Car Title		
Car Title		
Property-Separate		
Property-Separate		
Land Lease		
Mineral Lease		
List of Valuable Antiques		
List of Valuable Jewelry		
Bank Statements		
Brokerage Accounts Stmt		
Stock Certificates		
Savings Bonds		
Certificates of Deposit		

