

## VITAL INFORMATION

When someone passes away, it is a difficult time for family members. To make this time easier, you can use this form to keep a list of all important documents your family members will need to settle your affairs. Keep this document in a safe place.

NAME	SOCIAL SECURITY NUMBER
SAFE DEPOSIT BOX	
LOCATION	
BOX NUMBER	
WHO HAS ACCESS	
KEYS LOCATED	
CONTENTS	
WILL	
() YES () NO DATE EXECUTED	
LOCATION – ORIGINAL	
LOCATION – COPIES	
ADDRESS & PHONE	
TRUSTEE	
ADDRESS & PHONE	
GUARDIANS OF CHILDREN	
ADDRESS & PHONE	
POWER OF ATTORNEY	
WHOM	
ADDRESS & PHONE	
LIFE INSURANCE	
COMPANY	
NAME(S) OF INSURED	
BENEFICIARY(IES)	
LOCATION OF POLICIES	
AGENT	
ADDRESS & PHONE	
HEALTH INSURANCE	
COMPANY	
POLICY NUMBERS	
NAME(S) OF INSURED	
BENEFICIARY(IES)	
LOCATION OF POLICIES	
AGENT	
ADDRESS & PHONE	

HOME AND AUTO INSURANCE	
COMPANY	
POLICY NUMBERS	
TYPE OF COVERAGE	
LOCATION OF POLICIES	
AGENT	
ADDRESS & PHONE	
OTHER INSURANCE	
COMPANY	
POLICY NUMBERS	
WHAT COVERED	
LOCATION OF POLICIES	
AGENT	
ADDRESS & PHONE	
TITLES AND DEEDS TO PROPERTY  HOMES	
HOMES	
LOCATION OF PROPERTY	
LOCATION OF TITLE	
AUTOS	
LOCATION OF TITLE	
OTHER REAL ESTATE	
LOCATION OF TITLE	
LOCATION OF TITLE  () MORTGAGED () ON CONTRACT	
COMPANY/PERSONADDRESS & PHONE	
ADDRESS & THORE	
VALUABLES	
DESCRIPTION	
VALUE	
LOCATION	
IDENTIFYING NUMBER	
INCOME TAX SUMMARY	
FEDERAL	STATE
YEAR	
LOCATION	
BANK RECORDS	
NAME	
ADDRESS	
TYPE OF ACCOUNT	
ACCOUNT NUMBER	
NAMES ON ACCOUNT	
PENSION PLANS	
COMPANY	
NAME	

LOCATION OF PAPERS \_

INVESTMENTS
TYPE
ID NUMBER
IN WHOSE NAME
COMPANY
ADDRESS & PHONE
LOCATION OF PAPERS
CREDIT CARD/CHARGE ACCOUNTS
NAME OF CARD/STORE
ID NUMBER
IN WHOSE NAME
CONTACT
PHONE
DEBTS
TYPE
COMPANY/PERSON OWED
ADDRESS & PHONE
PAYMENTS
DUE DATE
PAID OFF WHEN
CERTIFICATES/LICENSES/AGREEMENTS
WHOSE LOCATION
BIRTH
MARRIAGE
MARRIAGEADOPTION
ADOPTION
ADOPTIONCITIZENSHIP
ADOPTION
ADOPTION
ADOPTION
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL
ADOPTION
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE
ADOPTION
ADOPTION
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY
ADOPTION
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY  ADDRESS & PHONE
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY  ADDRESS & PHONE  ORGANIZATIONS I BELONG TO
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY  ADDRESS & PHONE  ORGANIZATIONS I BELONG TO  NAME  NAME
ADOPTION  CITIZENSHIP  PRENUPTIAL  POSTNUPTIAL  DIVORCE  DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR  ADDRESS & PHONE  CEMETERY  ADDRESS & PHONE  PLOT NUMBER  LOCATION OF PAPERS  CHURCH/CLERGY  ADDRESS & PHONE  ORGANIZATIONS I BELONG TO  NAME  ADDRESS & PHONE
ADOPTION  CITIZENSHIP PRENUPTIAL POSTNUPTIAL DIVORCE DISCHARGE PAPERS  BURIAL  FUNERAL DIRECTOR ADDRESS & PHONE CEMETERY ADDRESS & PHONE LOCATION OF PAPERS CHURCH/CLERGY ADDRESS & PHONE  ORGANIZATIONS I BELONG TO  NAME ADDRESS & PHONE NAME

PROFESSIONAL/PERSONAL ASSOCIATES
DOCTOR
ADDRESS & PHONE
DENTIST
ADDRESS & PHONE
ATTORNEY
ADDRESS & PHONE
BANKER
ADDRESS & PHONE
ACCOUNTANT
ADDRESS & PHONE
TAX CONSULTANT
ADDRESS & PHONE
BROKER
ADDRESS & PHONE
EMPLOYER
ADDRESS & PHONE
NEXT OF KIN
ADDRESS & PHONE
OTHERS
ADDRESS & PHONE
ADDRESS & PHONE  MISCELLANEOUS ITEMS/NOTES

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