



## Clutter-Free Wealth Critical Records Organizer

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

### Emergency Contacts

Name	Phone/ Contact Information

### Safety Deposit Box

Bank Name and Address	Box #	Name of Joint Tenants	Location of Key

### Secure Information

Location of User IDs and Passwords	Date Last Updated

## Personal Information

### Primary Person

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Name
Date of Birth
Citizenship
SSN

### Significant Other

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Name
Date of Birth
Citizenship
SSN

### Children/Dependents

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Name	Contact Information	Date of Birth	SSN

### Personal Advisors

Name	Company	Contact Information	Phone
Financial Advisor			
Attorney			
Accountant			
Primary Physician			
Insurance Representative			
Estate Executor			
Clergy			

### Business/Professional Documents

Document Title	Location
Partnership/LLC Documents	
Corporate Documents	
Inventory of Business Assets	
Buy/Sell Agreements	
Other (e.g. Deferred Compensation Agreement)	

# Insurance Policies

Insured	Company	Policy Number
Health/Medical		
Life Insurance		
Long-Term Care		
Property/Casualty		
Disability		
Automobile		

## Financial Assets

Description	Account #	Company	Contact Information
Checking/Savings Accounts			
Retirement Plans (IRAs, 401(k))			
Certificates of Deposit			
Investment Accounts			
Stock Certificates			
Stock Option Plans			
Mortgages/Leases			

## Property Papers

Description	Location
Vehicle Titles	
Deeds to Real Property	
Boat Ownership Records	
Copyrights and Patents	
Important Receipts	

## Information Needed in Case of Incapacity

Document	Location
Power of Attorney for Health Care	
Power of Attorney for General Affairs	
Living Will	

### Information Needed in Case of Death

Document	Location/Info
Final Instructions/Funeral Instructions	
Will	
Living Trust	
Cemetery Plot Records	
Pension Info for Beneficiary/Survivor	

### Other Personal Documents

Document	Location/Info
Birth Certificate	
Passport	
Citizenship Papers	
Military Papers	
Marriage Certificate/ Divorce Papers	
SSN Card	