



Clutter-Free Wealth Critical Records Organizer

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

Name
Date of Birth
Citizenship
SSN

Significant Other

Name
Date of Birth
Citizenship
SSN

Children/Dependents

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	