

Assets Tracking Document

Who are my important contacts?

Retirement / Pension Systems:
Lawyer / Executor:
Accountant:
Insurance Agents:
Financial Planner / Stock Broker:
Funeral Arrangements:
Other:

Where are my records and documents stored?

A	Residence / Home safe (Combination / Key Location):
B	Safety Deposit Box (Bank / Key):
C	Personal Computer (Login / Password):
D	Internet (List of URLs, logins, passwords):
E	Other:

Basic Documents										
	A	B	C	D	E	A	B	C	D	E
Birth Certificate						Auto / Vehicle Titles and Records				
Citizenship Papers						Health Insurance Information				
Marriage Certificate						Property Titles / Deeds				
Children's Birth Certificates						Car Insurance Policy				
Guardianship Papers						Homeowner's Policy				
Divorce / Separation Papers						Mortgage / Loan Information				
Power of Attorney						Rental Property Records				
Trust Agreements (Original)						Income Tax Returns				
Military Discharge Papers						Other:				
Will (Original)						Other:				

Assets										
	A	B	C	D	E	A	B	C	D	E
Retirement Plans						Deferred Compensation / IRA Accounts				
Annuity Contracts						Life Insurance Policies				
Brokerage Account Records						Record of Investment Securities				
Stock Certificates / Plans						Mutual Funds / Bonds				
Certificates of Deposit						Other Securities				
Checking and Savings Accounts						Other:				
Credit Card Information						Other:				

Date Prepared _____ Copies Given to _____

Name _____
 Social Security # _____
 Birth Date _____
 Spouse's Name _____
 Spouse's Social Security # _____
 Spouse's Birth Date _____