

Personal Information Organizer

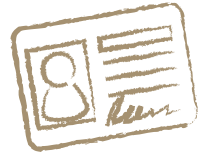


This form will provide your family with the information they need about your family accounts, documents and contact information. Fill it out as completely as possible, and then store in a secure place, like a safe, and make sure your estate executor or other responsible party knows where to find it.

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For more information about Texas Legal please visit us at www.TexasLegal.org.

Personal Information Organizer



Personal Information

Your Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Driver's License Number

Spouse Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Driver's License Number

Child #1 Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Child #2 Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Child #3 Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Child #4 Name

Address

City

State

Zip

Phone

Date of Birth

Social Security Number

Personal Information Organizer



What You Own

Property Name _____ **Property Owner** _____

Address _____

City _____ State _____ Zip _____ Approx. Value _____

Mortgage Owner _____

Address _____

City _____ State _____ Zip _____ Phone _____

Property Name _____ **Property Owner** _____

Address _____

City _____ State _____ Zip _____ Approx. Value _____

Mortgage Owner _____

Address _____

City _____ State _____ Zip _____ Phone _____

Automobile Make _____ **Model** _____ **Year** _____

Title Location _____

Loan Details _____

Automobile Make _____ **Model** _____ **Year** _____

Title Location _____

Loan Details _____

Other Assets _____

Name _____ Loan/Title/Location/Details _____

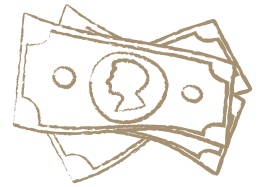
Name _____ Loan/Title/Location/Details _____

Name _____ Loan/Title/Location/Details _____

Name _____ Loan/Title/Location/Details _____

Name _____ Loan/Title/Location/Details _____

Personal Information Organizer



Financial Accounts

Savings Account Number

Account Holder

Bank Name

Website

Login

Password

Checking Account Number

Account Holder

Bank Name

Website

Login

Password

Additional Account Number

Account Holder

Bank Name

Website

Login

Password

Safe Deposit Box Number

Key Location

Institution Name

Contact Name

Address

City

State

Zip

Phone

Loan Number

Loan Description

Lender Name

Date of Loan

Monthly Payment Amount

Total Principal

Date

Interest Rate

Statement Location

Retirement Fund Account Number

Account Owner

Institution Name

Value

Date

Website

Login

Password

Other

Personal Information Organizer



Insurance

Auto Insurance Company

Policy Number

Agent's Name

Phone

Vehicles Insured

Home Owner's Insurance Company

Policy Number

Date Issued

Life Insurance Company

Policy Number

Owner

Primary Beneficiary

Death Benefit

Disability Insurance Company

Policy Number

Owner

Date Issued

Funeral and Burial Insurance Company

Policy Number

Owner

Date Issued

Long Term Care Insurance Company

Policy Number

Owner

Date Issued

Other

Personal Information Organizer



Location of Important Documents

Social Security Card

Driver's License Number

Birth Certificate

Passport/Visa

Marriage Certificate

Pre-Nuptial Agreement

Divorce Decree

Adoption Document(s)

Military Discharge/Military ID

Green Card/Naturalization Paper

Deeds/Titles to Property

Life Insurance Document(s)

Auto Insurance Document(s)

Home Insurance Document(s)

Health Insurance Document(s)

Mortgage or Loan Document

Retirement Benefit Statement(s)

Investments and Savings Document(s)

State & Federal Income Tax Returns

Employer/Union Benefits Information

Will or Trust

Living Will

Power of Attorney

Medical Power of Attorney

Funeral and Burial Instructions

HIPAA Document(s)

Letter of Instruction

Personal Information Organizer



Important Contact Information

Attorney Name

Firm Name

Address

Phone Number

Accountant Name

Firm Name

Address

Phone Number

Financial Planner Name

Firm Name

Address

Phone Number

Primary Care Physician Name

Address

Phone Number

Other Contact Name

Address

Phone Number

Other Contact Name

Address

Phone Number

Other

Personal Information Organizer

Online Accounts and Login Information



List additional accounts as well as login and password information here.

Email Address

Host

Login

Password

Email Address

Host

Login

Password

Social Media

Login

Password

Social Media

Login

Password

Other

You're done! Be sure to update this document regularly to keep all the information current.

Last Update MM/DD/YY

Last Update MM/DD/YY

Last Update MM/DD/YY