

Family Business Details

Create your own information file for family to use when you are no longer able to explain these things. This grid provides a sample of the information you may want to have easily accessible.

PERSON/ OFFICE	PHONE/ ADDRESS	COMMENTS
CHURCH / PASTOR		
LAWYER		
FINANCIAL ADVISOR		
LIFE INS AGENTS/ POLICIES		
TAX PREPARER/ ACC'TANT		
DOCTORS		
BUSINESS		
ALARM- / PASSWORD	Account numbers	Note if any are on auto-pay and how to access the account information
GAS		
CABLE		
ELECTRIC		
PHONE		
STORMWATER / SEWER		
YOUR SSN		
LOCATION OF IMPORTANT PERSONAL DOCUMENTS	Birth, marriage, divorce for you and spouse, will, living will, powers of attorney	Title to house, car

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ACCOUNTS/ BANK/ CCs	Contact information	Account numbers/ Passwords
BANKS/ CREDIT UNION		
BANK DEPOSIT BOX		
CREDIT CARDS		
OUTSTANDING LOANS		
LOCATION OF BONDS		
INSURANCE POLICIES	Policy number, location of the policy (ie in the safe or file cabinet)	Contact info for agent
LIFE		
HOME OWNERS		
CAR		
UMBRELLA		
BURIAL INFORMATION		
Location of cemetery, deed		
Preplanning or prepay?	With whom	Where is documentation
Specific personal wishes		
Specific bequests, not in will	In your own writing, signed, dated and kept with the will	
SUBSCRIPTIONS TO CANCEL	Web address	passwords
AMAZON		
NETFLIX, etc		
MAGAZINES		
FACEBOOK		
WHERE ARE PASSWORDS KEPT		