

Vital Records Guide

You can use this simple guide to organize your finances including your assets, liabilities, trusted financial partners, estate planning documents, website passwords, and more. This will help you keep track of your documents and help your loved ones, in the event of your passing. As this document contains personal information, it's important to keep it safe. As you review and update this guide periodically, you may consider destroying older versions.

Date Last Updated: Month _____ Year _____

Personal Information:

Name _____

Phone _____

Birth Date _____

Address _____

Social Security Number _____
(optional)

Spouse/Partner Name _____

Social Security Number (optional) _____

Birth Date _____

If none: Single Widowed Divorced

Do you have any children? Yes No

If yes, detail below:

Children

Birth Date

Social Security Number (optional)

Financial Information

Investment Accounts:

Financial Institution	Type (e.g., 401(k), 403(b), IRA, Taxable Brokerage)	Ownership: (Personal, Joint, etc.)	Estimated Value	Account Number	Online Account Statements (yes/no)
			\$		
			\$		
			\$		
			\$		
			\$		

Bank Accounts:

Financial Institution	Type (e.g., Checking, Savings, CDs, Money Market)	Ownership: (Personal, Joint, etc.)	Estimated Value	Account Number	Online Account Statements (yes/no)
			\$		
			\$		
			\$		
			\$		
			\$		

Insurance Policies:

Financial Institution	Type of Insurance (e.g., term, whole life, etc.)	Policy Owner	Beneficiary	Amount of Coverage	Online Account Statements (yes/no)
				\$	
				\$	
				\$	
				\$	
				\$	

Real Estate:

Address	Ownership (e.g., self, joint)	Estimated Value	Loan Balance (if applicable)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

Other Property or Business Interests:

Type (e.g., Vehicles, Safety deposit box, Furnishings, Jewelry, Collectibles, Art, Business Interest, Other)	Description	Estimated Value	Ownership (e.g., Personal, Joint, Other)	Location
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		

Debt:

Type (e.g., Credit Card, Car Loan, Mortgage, Personal Loan, Other)	Financial Institution	Interest Rate %	Loan Balance	Online Account Statements (yes/no)
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	

Other Information

Estate Planning and Other Documents:

Create estate planning documents for free on FreeWill.com/PBUCC

Type: (Will, Living Will, Durable Power of Attorney, etc.)	Last Updated	Location Stored

List of Trusted Advisors:

Category: (Financial, Tax, Legal, Insurance, etc.)	Name:	Organization	Phone:	Email

Passwords for Social Media, Technology, Locks, Other

Category: (Social Media, Technology, Locks, Other)	Description:	Password or Code	Answers to Questions to Verify Identity (if applicable)
			Question/Answer: Question/Answer: Question/Answer:
			Question/Answer: Question/Answer: Question/Answer:
			Question/Answer: Question/Answer: Question/Answer:
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Additional Notes including location of physical documents e.g., account statements, Deeds, Titles
