



## ARE YOU PREPARED?

Life's emergency situations require advance preparation and planning. Being prepared will help you avoid the trauma, expense and inconvenience of looking for critical documents under stressful emergency situations.

The first step is to organize your papers:

- Do you have an appropriate place for each document?
- Have you told anyone else where you keep your vital information?
- Have you shared your wishes in the event of your death?

Take action now to avoid financial problems later. The following **Personal Documents Log** has been designed to help you gather vital information in the form of papers, documents, policies, etc., and communicate their location to appropriate family members or friends.

Before getting started, remember the following tips:

- Always store original documents in a safe location that is accessible day and night, seven days a week.
- Make sure key family members and advisors have copies of this information and related documents.
- Review your **Personal Documents Log** every three to six months for possible revisions and updates.

*Resource: "The Complete Eldercare Planner" by Joy Loverde, updated and Revised, 2009, Random House.*

### PIN NUMBERS / ACCESS CODES

Bank by phone \_\_\_\_\_

Bank online \_\_\_\_\_

Debit cards \_\_\_\_\_

Cash \_\_\_\_\_

Telephone voice mail \_\_\_\_\_

Cell phone \_\_\_\_\_

Home access/Alarm code \_\_\_\_\_

### COMPUTER & INTERNET USAGE

Computer access password \_\_\_\_\_

Wireless security code \_\_\_\_\_

Email address \_\_\_\_\_

Email access code \_\_\_\_\_

Important websites & passwords \_\_\_\_\_

Location of flash drive backup files \_\_\_\_\_

### PERSONAL BANK ACCOUNTS

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Account name and number \_\_\_\_\_

Names on account \_\_\_\_\_

Type of account \_\_\_\_\_

Location of account documents \_\_\_\_\_

Second signature \_\_\_\_\_

Power of attorney \_\_\_\_\_



## (Personal Documents Log, Continued)

### AUTOMATIC BILL PAYING

Name of store and service \_\_\_\_\_

Contact name \_\_\_\_\_

Telephone \_\_\_\_\_

Date payment deducted \_\_\_\_\_

Bank and account number \_\_\_\_\_

Name of store/service \_\_\_\_\_

Contact name \_\_\_\_\_

Telephone \_\_\_\_\_

Date payment deducted \_\_\_\_\_

Bank and account number \_\_\_\_\_

### ELECTRONIC FUNDS TRANSFER ACCOUNT (ETA)

Account name and number \_\_\_\_\_

Names on account \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

### PERSONAL LOAN

Name(s) on loan \_\_\_\_\_

Loan number \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Type of loan \_\_\_\_\_

Location of loan papers \_\_\_\_\_

### OUTSTANDING LIEN AGAINST PROPERTY

Name(s) on loan \_\_\_\_\_

Loan number \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Location of loan papers \_\_\_\_\_

### PAID LIENS AGAINST PROPERTY

Name(s) on loan \_\_\_\_\_

Loan number \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Location of proof of payment papers \_\_\_\_\_

### INSTALLMENT LOAN

Name(s) on loan \_\_\_\_\_

Loan number \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Location of loan papers \_\_\_\_\_

### BUSINESS BANK ACCOUNT

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Location of account documents \_\_\_\_\_

Business name on account \_\_\_\_\_

Account number \_\_\_\_\_

Type of account \_\_\_\_\_

Second signature \_\_\_\_\_

Power of attorney \_\_\_\_\_

### BUSINESS LOAN

Name(s) on loan \_\_\_\_\_

Loan number \_\_\_\_\_

Bank \_\_\_\_\_

Telephone \_\_\_\_\_

Type of loan \_\_\_\_\_

Location of loan papers \_\_\_\_\_

### CREDIT UNION

Union name \_\_\_\_\_

Telephone \_\_\_\_\_

Name on account(s) \_\_\_\_\_

Type of account(s) \_\_\_\_\_

Account number(s) \_\_\_\_\_

Location of documents \_\_\_\_\_



## (Personal Documents Log, Continued)

### FOREIGN BANK ACCOUNT

Name on account(s) \_\_\_\_\_  
Type of account(s) \_\_\_\_\_  
Account number(s) \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of account documents \_\_\_\_\_

### COMPANY PENSION

Name on pension \_\_\_\_\_  
Reference number \_\_\_\_\_  
Dates of employment \_\_\_\_\_  
Company name \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of pension papers \_\_\_\_\_

### RETIREMENT ACCOUNT

Name on account \_\_\_\_\_  
Account reference number \_\_\_\_\_  
Type of account \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of account documents \_\_\_\_\_

### SAVINGS CERTIFICATE

Depositor \_\_\_\_\_  
Certificate number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of certificate \_\_\_\_\_

### SAVINGS BOND

Bond held by \_\_\_\_\_  
Type of bond \_\_\_\_\_  
Bond series number \_\_\_\_\_  
Location of bond \_\_\_\_\_

### STOCK CERTIFICATE

Stockholder(s) \_\_\_\_\_  
Stock name \_\_\_\_\_  
Stock number \_\_\_\_\_  
Broker \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of stock documents \_\_\_\_\_

### SAFE DEPOSIT BOX

Box holder \_\_\_\_\_  
People with access to box \_\_\_\_\_  
Telephone \_\_\_\_\_  
Box number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone \_\_\_\_\_  
Key location \_\_\_\_\_

### CASH-ON-HAND

Location \_\_\_\_\_

### HOME SAFE

People with access to safe \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of combination or key \_\_\_\_\_

### BUSINESS SAFE

People with access to safe \_\_\_\_\_  
Telephone \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of combination or key \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### WILL

Will of \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original will papers \_\_\_\_\_  
People with copies of will papers \_\_\_\_\_  
Telephone \_\_\_\_\_



## (Personal Documents Log, Continued)

### TRUST

Established by \_\_\_\_\_  
Trust for \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original trust papers \_\_\_\_\_  
People with copies of trust papers \_\_\_\_\_

### LIVING WILL

Will of \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original living will \_\_\_\_\_  
People with copies of living will \_\_\_\_\_  
Telephone \_\_\_\_\_

### POWER OF ATTORNEY FOR PROPERTY

Given to \_\_\_\_\_  
Telephone \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original document \_\_\_\_\_  
People with copy of papers \_\_\_\_\_

### POWER OF ATTORNEY FOR HEALTH CARE

Location of original document \_\_\_\_\_  
People with copies of the document \_\_\_\_\_  
Agent \_\_\_\_\_  
Telephone \_\_\_\_\_

### LETTERS OF INSTRUCTION

Written by \_\_\_\_\_  
Location of original documents \_\_\_\_\_  
Telephone \_\_\_\_\_  
People with copies of documents \_\_\_\_\_  
Telephone \_\_\_\_\_

### FUNERAL INSTRUCTIONS / MEMORIAL SERVICES

Arranged by \_\_\_\_\_  
Funeral home \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of instruction papers \_\_\_\_\_  
People with copies of instructions \_\_\_\_\_  
Telephone \_\_\_\_\_

### DONOR ARRANGEMENT

Location of documentation \_\_\_\_\_

### AUTOPSY PERMISSION

Location of documentation \_\_\_\_\_

### SOCIAL SECURITY

Social Security number \_\_\_\_\_  
Location of Social Security card \_\_\_\_\_

### MILITARY DISCHARGE PAPERS

Veteran name \_\_\_\_\_  
Service number \_\_\_\_\_  
Location of discharge papers \_\_\_\_\_

### INCOME TAX FILINGS

Name of taxpayer \_\_\_\_\_  
Tax identification number \_\_\_\_\_  
Tax adviser \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of tax records \_\_\_\_\_

### PASSPORT

Name on passport \_\_\_\_\_  
Passport number \_\_\_\_\_  
Location of passport \_\_\_\_\_



## (Personal Documents Log, Continued)

### DRIVER'S LICENSE

Name on license \_\_\_\_\_

License number \_\_\_\_\_

State license issued \_\_\_\_\_

License renewal date \_\_\_\_\_

### CREDIT CARDS / CHARGE ACCOUNTS

Account name \_\_\_\_\_

Account number \_\_\_\_\_

Name on account \_\_\_\_\_

Location of card \_\_\_\_\_

### MEDICARE

Name \_\_\_\_\_

Number \_\_\_\_\_

Effective date \_\_\_\_\_

### MEDICAID

Name \_\_\_\_\_

Number \_\_\_\_\_

Effective date \_\_\_\_\_

### HEALTH CARE INSURANCE

Subscriber's name \_\_\_\_\_

Contract number \_\_\_\_\_

Group number \_\_\_\_\_

Insurance company \_\_\_\_\_

Telephone \_\_\_\_\_

### LONG-TERM CARE INSURANCE

Name on policy \_\_\_\_\_

Policy number \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance agent \_\_\_\_\_

Telephone \_\_\_\_\_

Location of policy \_\_\_\_\_

### LIFE INSURANCE

Name on policy \_\_\_\_\_

Policy number \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance agent \_\_\_\_\_

Telephone \_\_\_\_\_

Location of policy \_\_\_\_\_

Name on annuity \_\_\_\_\_

Insurance company \_\_\_\_\_

Contract number \_\_\_\_\_

Location of papers \_\_\_\_\_

### DISABILITY INSURANCE

Name on policy \_\_\_\_\_

Policy number \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance agent \_\_\_\_\_

Telephone \_\_\_\_\_

Location of policy \_\_\_\_\_

### HOMEOWNERS INSURANCE

Name on policy \_\_\_\_\_

Policy number \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance agent \_\_\_\_\_

Telephone \_\_\_\_\_

Location of policy \_\_\_\_\_

### REAL ESTATE INVESTMENT INSURANCE

Name on policy \_\_\_\_\_

Policy number \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance agent \_\_\_\_\_

Telephone \_\_\_\_\_

Location of policy \_\_\_\_\_



## (Personal Documents Log, Continued)

### RENTER'S INSURANCE

Name on policy \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of policy \_\_\_\_\_

### BUSINESS INSURANCE

Name on policy \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of policy \_\_\_\_\_

### LIABILITY INSURANCE

Name on policy \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of policy \_\_\_\_\_

### VEHICLE INSURANCE

Policy holder \_\_\_\_\_  
Vehicle insured \_\_\_\_\_  
Vehicle registration number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of title \_\_\_\_\_

### VEHICLE

Vehicle \_\_\_\_\_  
Make and model \_\_\_\_\_  
Serial number \_\_\_\_\_  
Where purchased \_\_\_\_\_  
Telephone \_\_\_\_\_

Name on title \_\_\_\_\_  
Location of title papers \_\_\_\_\_  
Location of electronic toll collection system \_\_\_\_\_

### VALUABLES INSURANCE

Policy holder \_\_\_\_\_  
Item insured \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of policy \_\_\_\_\_

### REAL ESTATE OWNERSHIP DOCUMENTS

Property address \_\_\_\_\_  
Owner \_\_\_\_\_  
Telephone \_\_\_\_\_  
Co-owner \_\_\_\_\_  
Telephone \_\_\_\_\_  
Bank or mortgage company \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of documents \_\_\_\_\_

### CEMETERY PLOT

Owner \_\_\_\_\_  
Plot intended for \_\_\_\_\_  
Cemetery \_\_\_\_\_  
Plot location \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of plot deeds \_\_\_\_\_

### SUBSCRIPTIONS

Name of publication \_\_\_\_\_  
Sent to \_\_\_\_\_  
Name of publication \_\_\_\_\_  
Sent to \_\_\_\_\_  
Name of publication \_\_\_\_\_  
Sent to \_\_\_\_\_



## (Personal Documents Log, Continued)

### CLUB MEMBERSHIPS

Organization \_\_\_\_\_

Telephone \_\_\_\_\_

Organization \_\_\_\_\_

Telephone \_\_\_\_\_

### MEMBERSHIP / SMART CARDS

Account name \_\_\_\_\_

Account number \_\_\_\_\_

Name on account \_\_\_\_\_

Location of card \_\_\_\_\_

### RELIGIOUS AFFILIATION

Place of worship \_\_\_\_\_

Address \_\_\_\_\_

Clergy person \_\_\_\_\_

Telephone \_\_\_\_\_

Documentation of special instructions \_\_\_\_\_

### RELIGIOUS RITES AND CEREMONIES

Event \_\_\_\_\_

Event date \_\_\_\_\_

Place of event \_\_\_\_\_

Records storage location \_\_\_\_\_

### ITEMS IN STORAGE

Stored in name of \_\_\_\_\_

What is being stored \_\_\_\_\_

Storage company \_\_\_\_\_

Telephone \_\_\_\_\_

Location of storage documents \_\_\_\_\_

### ITEMS — REPAIRED/RESTORED/ CLEANED

Item owner \_\_\_\_\_

Item description \_\_\_\_\_

Shop name \_\_\_\_\_

Telephone \_\_\_\_\_

Claim ticket location \_\_\_\_\_

### ITEMS BORROWED

Item description \_\_\_\_\_

Lent to \_\_\_\_\_

Telephone \_\_\_\_\_

### ITEMS ON ORDER

Ordered for \_\_\_\_\_

Item description \_\_\_\_\_

Order reference number \_\_\_\_\_

Shop name \_\_\_\_\_

Telephone \_\_\_\_\_

Expected order date \_\_\_\_\_

### PERSONAL CONTRACTS/ AGREEMENTS

Names on contract \_\_\_\_\_

Telephone \_\_\_\_\_

Nature of agreement \_\_\_\_\_

Location of paperwork \_\_\_\_\_

### MEDICAL HISTORY

History of \_\_\_\_\_

Birth date \_\_\_\_\_

Location of records \_\_\_\_\_

### BIRTH RECORD

Name at birth \_\_\_\_\_

Birth date \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate location \_\_\_\_\_

### ADOPTION PAPERS

Adoption name \_\_\_\_\_

Adopted by \_\_\_\_\_

State of adoption \_\_\_\_\_

Adoption agency \_\_\_\_\_

Telephone \_\_\_\_\_

Location of paperwork \_\_\_\_\_



## (Personal Documents Log, Continued)

### NATURALIZATION PAPERS

Citizen name \_\_\_\_\_

Place of naturalization \_\_\_\_\_

Location of papers \_\_\_\_\_

### MARRIAGE LICENSE

Names on license \_\_\_\_\_

Marriage date \_\_\_\_\_

State license issued \_\_\_\_\_

License location \_\_\_\_\_

### DIVORCE DECREE

Names on decree \_\_\_\_\_

Divorce date \_\_\_\_\_

State divorce granted \_\_\_\_\_

Decree location \_\_\_\_\_

### SCHOOL RECORDS

Student name \_\_\_\_\_

School \_\_\_\_\_

School location \_\_\_\_\_

Telephone \_\_\_\_\_

Dates attended \_\_\_\_\_

Graduation date \_\_\_\_\_

Diploma location \_\_\_\_\_

### EMPLOYMENT HISTORY

Employee name \_\_\_\_\_

Dates of employment \_\_\_\_\_

Company \_\_\_\_\_

Company address \_\_\_\_\_

Telephone \_\_\_\_\_

### MOTHER'S HISTORY

Mother's name at birth \_\_\_\_\_

Date of birth \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate location \_\_\_\_\_

Mother's name at death \_\_\_\_\_

Cause of death \_\_\_\_\_

Date of death \_\_\_\_\_

Location of death \_\_\_\_\_

Burial location \_\_\_\_\_

Death certificate location \_\_\_\_\_

### FATHER'S HISTORY

Father's name at birth \_\_\_\_\_

Date of birth \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate location \_\_\_\_\_

Father's name at death \_\_\_\_\_

Cause of death \_\_\_\_\_

Date of death \_\_\_\_\_

Location of death \_\_\_\_\_

Burial location \_\_\_\_\_

Death certificate location \_\_\_\_\_

### DEPENDENTS

Name \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate location \_\_\_\_\_

### GROWN CHILDREN – NO LONGER DEPENDENTS

Name \_\_\_\_\_

Date of birth \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_

### PETS

Name of pet \_\_\_\_\_

Breed \_\_\_\_\_

Date of birth \_\_\_\_\_

Sex \_\_\_\_\_

Animal hospital \_\_\_\_\_

Telephone \_\_\_\_\_

Breeder \_\_\_\_\_

Is promised to \_\_\_\_\_





## (Personal Documents Log, Continued)

### HOME INVENTORY

(fixtures, furniture, equipment, appliances)

Item description \_\_\_\_\_

Model number \_\_\_\_\_

Purchase price \_\_\_\_\_

Value of item today \_\_\_\_\_

Location of receipt \_\_\_\_\_

Location of warranty \_\_\_\_\_

Location of item instructions \_\_\_\_\_

Is promised to \_\_\_\_\_

### PERSONAL ITEMS INVENTORY

(clothes, books, photos, mementos)

Item description \_\_\_\_\_

Purchase price \_\_\_\_\_

Value of item today \_\_\_\_\_

Location of receipt \_\_\_\_\_

Is promised to \_\_\_\_\_

### VALUABLES INVENTORY

(collections, jewelry, artwork, antiques)

Item description \_\_\_\_\_

Serial number \_\_\_\_\_

Purchase price \_\_\_\_\_

Value of item today \_\_\_\_\_

Location of receipt \_\_\_\_\_

Is promised to \_\_\_\_\_

### BUSINESS INVENTORY

(fixtures, furniture, equipment, appliances)

Item description \_\_\_\_\_

Model number \_\_\_\_\_

Purchase price \_\_\_\_\_

Value of item today \_\_\_\_\_

Location of receipt \_\_\_\_\_

Location of warranty \_\_\_\_\_

Location of item instructions \_\_\_\_\_

Is promised to \_\_\_\_\_



13800 W. 116th Street • Olathe, Kansas 66062 • (913) 323-7110 • [SantaMartaRetirement.com](http://SantaMartaRetirement.com)

