

Prepared by:

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Personal Data Record

(Date this record was last revised _____)

Location of Important Documents

1. Adoption Papers _____
2. Automobile Titles _____
3. Bank passbooks _____
4. Birth Certificates _____
5. Business agreements _____
6. Deeds, mortgages, etc. _____
7. Cemetery plot title _____
8. IRAs, money market, certificates of deposit, and Keogh accounts

9. Insurance policies _____
10. Marriage certificate(s) _____
11. Military serial number and evidence of service _____

12. Lease agreement(s) _____
13. Naturalization papers _____
14. Notes and obligations _____
15. Safe deposit box(es) _____
16. Safe deposit key(s) _____

17. Securities (stocks and bonds) _____

18. Social Security number and records _____

19. Tax returns for prior years and receipts _____

20. Pension and retirement benefits data _____

21. Trust fund(s) records _____

22. Veterans' Administration claim number _____

23. Will _____

24. Other _____

Important Names, Addresses, and Phone Numbers

1. Physician _____

Address _____

Phone _____

2. Clergy _____

Address _____

Phone _____

3. Funeral director _____

Address _____

Phone _____

4. Attorney _____

Address _____

Phone _____

5. Insurance agent(s) _____

Address _____

Phone _____

6. Executor _____

Address _____

Phone _____

7. Accountant _____

Address _____

Phone _____

8. Stockbroker _____

Address _____

Phone _____