

SUMMIT FINANCIAL MANAGEMENT

Personal Affairs Organizer

Completed by	
Date completed	

KEEP THIS ORGANIZER IN A SECURE, PRIVATE LOCATION

It holds passwords, account numbers and other sensitive information.

About this organizer

When someone in your family dies or can no longer manage their own affairs, the people stepping in often cannot find what they need, because key details were known only to that person. This organizer gathers that information in one place so it is at hand when it is needed.

Type directly into the tables, or print it and fill it in by hand. Skip anything that does not apply, and add rows wherever you need more room.

I. Important People

Family contacts

Contact	Name	Address	Phone / fax	Email
Primary contact (e.g., spouse, child)				
Secondary contact (e.g., child)				
Secondary contact				
Secondary contact				

Professional advisors

Role	Name	Address	Phone / fax	Email
Accountant / business manager				
Stock broker / investment advisor				
Financial planner				
Life / disability insurance agent				
Casualty insurance agent				
Primary bank contact				
Estate planning attorney				
Business attorney				

Employer and personal assistant

Who	Name and contact information
Employer	
Personal assistant	

II. Insurance Information

Coverage	Account / policy nos.	Primary contact	Phone	Location of documents
Medical				
Supplemental				
Dental				
Vision				
Disability				
Life insurance				
Property / casualty				
Long term care				

III. Medical Issues

Health and long term care insurance

Coverage	Name of insurance company	Policy number	Phone / fax	Email
Health insurance				
Long term care insurance				

Advance health care directive and organ donation

Item	Details
Advance health care directive: primary agent's name	
Advance health care directive: agent's phone	
Location of the advance health care directive (AHCD)	
Organ donation: if you have signed paperwork saying your organs should be donated, where is it kept?	

Physicians and clergy

Role	Name	Address	Phone / fax	Email
Primary physician				
Other physician, if any				
Minister, priest or rabbi				

IV. Location of Important Papers

Question	Your answer
Do you have a safe deposit box? If so, the bank's name and branch	
Address of that bank	
Where is the safe deposit box key, and who has access to the box?	
Where are important papers kept in your house? (For example: a safe, a file cabinet, a desk)	
If you have a safe, what is the combination?	
Where are your original estate planning documents?	
If you have written a private letter to be delivered to your family, where is it?	

V. Digital Accounts and Passwords

Your family may need to get into password-protected accounts and devices if you die or can no longer manage your affairs. The list below is a starting point: add, remove and rename rows to match what you actually use, and update it regularly.

Service provider / device	Website / URL	User name	Password
Computer			
Home			
Laptop			
Office			
Other			
Credit cards			
American Express			
MasterCard			
Visa			
Other			
Digital media			
Amazon Kindle / Prime			
Apple iTunes			
Barnes and Noble Nook			
Hulu			
Netflix			
YouTube			
Other			
Domain name and registrar / host			
Email providers			

Service provider / device	Website / URL	User name	Password
Office			
Home			
Other			
Financial			
Bank			
Broker			
Investment advisor			
Other			
Home			
Cable / satellite company			
Electric company			
Gas company			
Home security			
Insurance (home)			
Phone / data company			
Other			
Instant messaging, chat and video conference accounts			
AOL Instant Messenger			
Skype			
Yahoo! Messenger			
Other			
Mobile phone / handheld			
Online shopping and auction accounts			

Service provider / device	Website / URL	User name	Password
Amazon			
Barnes and Noble			
Craigslist			
eBay			
PayPal			
Zappos			
Other			
Online storage and back-up accounts			
Apple iCloud			
Backblaze			
Carbonite			
Dropbox			
Google Drive			
Microsoft OneDrive			
Mozy			
Other			
Personal / health			
Doctor			
Insurance (health)			
Other			
Photos / videos			
Instagram			
Flickr			

Service provider / device	Website / URL	User name	Password
Photobucket			
SmugMug			
Snapfish			
Vimeo			
YouTube			
Other			
Professional organization			
Social networking accounts			
Facebook			
LinkedIn			
Foursquare			
Google Plus			
Myspace			
Twitter			
Other			
Tablet / iPad			
Travel			
Airline			
Rental car			
Other			
Voicemail			
Home			
Mobile phone			

Service provider / device	Website / URL	User name	Password
Office			
Other			
Other passwords			

Managing your digital accounts

1. Go through every account you listed above.
2. Decide which accounts your close family or personal representative should be able to get into and keep running. Prepare a written list and an electronic list of those accounts, with their user names and passwords.
3. Decide which accounts you want closed or deleted, and leave written instructions for doing so.
4. Store the written and electronic lists somewhere secure and private. Consider keeping the electronic copy on a USB drive or external hard drive, encrypted or password-protected. Tell your close family or personal representative how to open it, and update it whenever a password changes.
5. If your photos, videos or other keepsakes live in cloud storage, back them up to a computer or drive that you control. Keep the backup somewhere safe and tell your close family or personal representative how to reach it.

VI. House and Car Information

Item	Firm	Contact	Phone / email
Electrical (include location of circuit breakers)			
Plumbing			
Swimming pool			
Landscaping			
Fountain			
Sprinkler system			
Outdoor lighting			
Garage door			
Electronic gate			
Alarm system			
Car lease information and dealer contact			
Location of extra keys to car, house, office, etc.			

VII. Recurring Automatic Charges and Withdrawals

Charge	Info for cancellation
Mortgage	
Rent	
Magazines	
Newspaper	
Telephone service	
Television service	
DSL / internet service	
Cable service	
Health club	
Tennis club	
Golf club	
Wine club	
Food delivery	
Grocery delivery	
Housekeeper	
Gardener	
Auto lease / payments	
Subscription services	

Charge	Info for cancellation

VIII. Credit Cards

Credit card issuer	Card number	PIN or password

IX. Assets

Add rows or attach additional pages if necessary.

Assets	Related information	Location of documents
Real estate		
Securities		
Cash		
Notes receivable		
Life insurance		
Cars		
Partnership / LLC interests		
Annuities		
Pension and retirement plans		

Assets	Related information	Location of documents
Art (attach list)		
Other		

X. Liabilities

Add rows or attach additional pages if necessary.

Liabilities / debts	Related information	Location of documents

Liabilities / debts	Related information	Location of documents

XI. Funeral Arrangements

If you have made funeral arrangements

Funeral home	Details
Name	
Address	
Phone	
Funeral director or contact person	

If you have not made funeral arrangements

Indicate your wishes below.

Option	Yes	No
Cremation	☐	☐
Burial	☐	☐
Burial at sea	☐	☐
Memorial service	☐	☐
Burial without memorial service	☐	☐
Private service	☐	☐
Public service	☐	☐

This is not a complete list of the options. It is important that you discuss these issues with your family.

Obituary

What information would you like included in an obituary?

Attach a list of people to be notified about the funeral, together with their contact information.

XII. Death Certificate Information

Information	Spouse #1	Spouse #2
Full name		
Birth name, if different		
Date of birth		
Place of birth		
Sex		
Race		
Full name of father		
Birthplace of father		
Full maiden name of mother		
Birthplace of mother		
Social Security number		
Marital status		
Name of spouse		
Occupation		
Type of business		
Employer		
Years at occupation		
Education (years completed)		
Residence address		
City		
State		

Information	Spouse #1	Spouse #2
County		
Year established residency in this state		
Military service (list years)		
Branch of service		
Served where		