

Family Financial Organizer

Keep your policies, accounts and important contacts in one place, so the people you love know where to find them when it matters.

Keep this somewhere safe, such as a locked drawer or fireproof box, and tell one trusted person where it is. Write only the last 4 digits of account numbers, and never write down passwords: note where your password manager or password list is kept instead.

Prepared by: _____

Date last updated: _____

Key contacts

Role	Name	Phone / email
Spouse or emergency contact		
Insurance agent		
Financial professional		
Attorney		
Accountant or tax preparer		
Employer HR / benefits		
Primary doctor		

Insurance policies

Type (life, health, Medicare, home, auto, disability)	Company	Policy no. (last 4)	Beneficiary	Agent / phone

Bank and investment accounts

Institution	Account type	Last 4 digits	Joint owner or beneficiary

Retirement accounts and pensions

Plan or institution	Type (401(k), IRA, Roth, pension)	Last 4 digits	Beneficiary

Property, vehicles and debts

Item (home, car, loan, credit card)	Lender or institution	Balance	Where the paperwork is

Where important documents are kept

Document	Location
Will or trust	
Power of attorney (financial)	
Health care directive / medical power of attorney	
Birth and marriage certificates	
Passports and immigration papers	
Property deeds and car titles	
Recent tax returns	
Password manager or password list	

Final wishes and instructions
