

IMPORTANT INFORMATION ORGANIZER

NAME		INFORMATION CURRENT AS OF	
ADDRESS		DATE OF BIRTH	
PHONE NUMBER		SOCIAL SECURITY NUMBER	

EMERGENCY CONTACT INFORMATION

Role	Name	Phone Number	Email Address
PRIMARY CARE DOCTOR			
ATTORNEY			
FINANCIAL PLANNER/ADVISOR			
ACCOUNTANT			
TRUSTED FAMILY MEMBER/FRIEND			
OTHER			
OTHER			

MEDICAL INFORMATION

Medications	Dosage
Allergies	
Medical Devices	

LEGAL DOCUMENTS

WILL	POWER OF ATTORNEY	HEALTHCARE PROXY	LIVING WILL/ADVANCE DIRECTIVE
<input type="checkbox"/> Is in place <input type="checkbox"/> Is not in place If yes, where can the original be found?	<input type="checkbox"/> Is in place <input type="checkbox"/> Is not in place If yes, where can the original be found?	<input type="checkbox"/> Is in place <input type="checkbox"/> Is not in place If yes, where can the original be found?	<input type="checkbox"/> Is in place <input type="checkbox"/> Is not in place If yes, where can the original be found?

Describe other important documents and where they are located (ex birth, marriage, divorce, death certificates; passports; adoption paperwork; leases and property deeds)

FINANCIAL DOCUMENTS

BANK ACCOUNTS

Type of account (eg checking, savings, CD)	Title of Account	Institution Name	Account Number

INVESTMENT ACCOUNTS

Type of account (eg IRA, Roth IRA, 401k, 403b, SEP, individual or joint brokerage account)	Title of Account	Institution Name	Account Number

LIFE INSURANCE POLICIES

Type of policy (eg term, universal, whole, hybrid)	Insurer	Beneficiary	Policy Number

OTHER INSURANCE POLICIES

Type of policy	Insurer	Policy Number
LONG TERM CARE		
AUTO		
HOMEOWNERS/RENTERS		
UMBRELLA		
HEALTH		
DENTAL		
OTHER		

OUTSTANDING LIABILITIES

Type (eg mortgage; credit card; line of credit; student, personal, auto, business loan)	Loan Holder	Approximate Amount Due	Account Number

OTHER INFORMATION

If there is other information that will be important for people to know in case of emergency (ex location of spare keys, how to access the safe, children's school contacts, computer or phone passwords, pet care information, etc.), please use the space below
