



ESSENTIAL INFORMATION ORGANIZER

A practical companion to the planning you've done.

Important contacts and how they can be reached.

Utility and miscellaneous household information like subscriptions and security alarm codes.

Where you keep official & legal documents.

Financial details, insurance policies, and estate information.

Medical details.

Social media or digital platforms that will need to be managed or disconnected.



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Planning With Purpose



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Do you keep meaning to get organized, but somehow it always ends up at the bottom of the list? You're not alone. In our work with clients, we often hear that it feels like something they "should" do—but never quite get around to.

Organizing and planning ahead doesn't have to be complicated—but it can make a world of difference to the people you care about. Simply having a clear way to find key documents and details can ease stress and simplify decisions. That's why we created this **Essential Information Organizer**.

This isn't a replacement for legal documents like your will or power of attorney. Instead, it's a practical tool to help you keep track of where those documents are stored, who to contact in an emergency, and personal or household information that can help when life gets complicated. Think of it as a practical companion to the planning you've already done.

There's no right or wrong way to use the organizer. Work through it at your own pace, skip sections that don't apply, or just make a simple note like "stored in the filing cabinet downstairs." The goal is clarity, not perfection.

If you have any questions or would like support along the way, we're here to help!

Warmly,





Personal Information

Full Legal Name	<input type="text"/>		
Other Names I've Gone By	<input type="text"/>		
DOB	<input type="text"/>	Place of Birth	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>
Address City, St Zip	<input type="text"/>		
Previous Addresses	<input type="text"/>		

Full Legal Name	<input type="text"/>		
Other Names I've Gone By	<input type="text"/>		
DOB	<input type="text"/>	Place of Birth	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>
Address City, St Zip	<input type="text"/>		
Previous Addresses	<input type="text"/>		





Important Contacts

FAMILY MEMBERS AND TRUSTED CONTACTS TO NOTIFY IMMEDIATELY

Name(s)	Relationship	Phone(s)	Notes

PROFESSIONALS

Provider	Name/Business	Phone	Email
Financial Advisor			
Attorney			
CPA/Accountant			
Insurance Agent			
Executor			
Employer			
Vet (don't forget your pets!)			

See medical documents page for primary doctor, specialists, etc.

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Important Documents



What	Location/Notes
Birth Certificate	
Social Security Card/Number	
Driver's License - Number & expr date	
Marriage Certificate	
Prenuptial Agreement	
Divorce or Separation Papers	
Alimony, Child Support	
Military Discharge Papers (DD214)	
Adoption Papers	
Passport/Citizenship Docs	
Military ID	
Degrees/Certificates/Prof. Licences	
Veteran's Administration Paperwork	
Death Certificates	
Organ Donor Information	

HAVE YOU NAMED AN EXECUTOR?

Name

Phone

Email

Notes

Do you have a letter of instruction?



Household Information

UTILITIES AND MEMBERSHIPS REQUIRING FEES

List them all or where to find copies of paid bills or account information. Zoo, golf course, gym, country club - anything you pay regularly for membership.

Service	Account # or Provider Name/Password
Gas	
Electricity	
Water	
Internet	
Cable	
Trash	
Phone	
Phone	

MISCELLANEOUS HOUSEHOLD

Document Type	Location/Notes
Pet Veterinarian Files/Bills	
Pet Vaccination Records	
Warranty Documentation	
Church/Baptism Records	
Home Inventory	

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Legal Documents

A common misconception is that marriage automatically grants a spouse authority to make financial or healthcare decisions on behalf of the other. While *marriage* does establish a legal relationship, it *doesn't grant automatic power of attorney rights*. Without proper documentation, a spouse may not have the legal ability to manage financial accounts, pay bills, oversee investments, or handle real estate transactions.

»»» Work with your attorney to ensure you have the legal documents you need.

WILL AND TRUST DOCUMENTS

Document Name	Last Updated	Location/Notes
Will (<i>Wills should not be kept in a safe deposit box. Rather, they should be stored in either a lawyer's will safe or a fireproof safe at your home.</i>)		
Trust Paperwork & Details		
Financial Power(s) of Attorney (POA) (Durable or other?)		
Payable on Death (POD) Documents		
Lawsuits or Documents on Pending Legal Actions		

See also Legal Documents - Medical



Legal Documents - Medical

Document Name	For Whom?	Last Updated	Where to Find It/Notes
DNR/Do Not Intubate Order(s)			
DNR/Do Not Intubate Order(s)			
Physicians orders for life-sustaining treatment (POLST)			
Physicians orders for life-sustaining treatment (POLST)			
Healthcare POA			
Healthcare POA			
Living Will			
Living Will			
Financial Institution's Proprietary Power of Attorney <i>(Some financial institutions may refuse to accept a standard power of attorney.)</i>			

Your attorney can help you decide which legal documents you need. Here are a few questions to help you think about situations these documents are designed to support:

- If you had a medical emergency, who would doctors turn to for decisions?
Have you talked with that person about your wishes?
- Are there treatments you'd want - or not want - if you couldn't speak for yourself?
- Is there a hospital or facility you would - or would not - want to go to?
- Are there specific conditions under which you would - or would not - want life-sustaining treatment?
- If long-term care became necessary, do you have preferences about where and how that care happens (for example - at home vs. in a facility)?

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Medical Documents and Health Information

HEALTHCARE

Provider	Name/Business	Phone	Email
Preferred Hospital			

Consider listing primary doctors, and any you see regularly such as dermatologists or allergists.
You may also wish to list dentists, eye doctors, chiropractors, etc.

ONGOING OR EMERGENT MEDICAL ISSUES, ALLERGIES, TREATMENT, SPECIALISTS

PRESCRIPTION PLAN CARD, VACINATION RECORDS

Location

Location

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Taxes and Insurance

TAXES

Document Type	Location	Notes
Deferred Compensation Agreements		
Prior Year's Income Tax Returns		
Property Tax Records		
Federal/State Gift-Tax Returns		
Vehicle Tax		

INSURANCE

Document Type	Location	Notes
Mortgage Insurance		
Property and Casualty Insurance		
VA Insurance		
Beneficiary Forms <i>(for insurance or annuity policies)</i>		
Long Term Care (LTC) Insurance/Disability Insurance		
Life Insurance		
Auto Insurance		

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Assets - Investment Documents



Do you use an online financial aggregation service or app?
List details or make sure a trusted person knows where to find this information and how to access anything that is password protected.

Document Type	Institution/Location/Notes (include online access information if applicable)
Brokerage account statement(s)	
Mutual fund account statement(s)	
Individual retirement plan statement(s) (IRA/Roth)	
Annuity account statement(s)	
Company retirement plan statement(s) (401k/403b/457)	
Other company benefits (e.g., deferred compensation and pension)	
Stock certificates or Bearer bonds not held in an account	
Alternative investment docs	
529 college savings plan statements	
Beneficiary forms for IRAs, 401(k)s, other benefits plans or transfer on death (TOD) docs showing cost basis of securities owned or sold	

Use another sheet if necessary..

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Assets - Banking and Financial



Include how to access anything that is password protected and information about any online financial aggregation services or apps.

Item	Institution	Notes (Account #, Where stored, location of documents)
Checks/debit cards		
Checking Account Information & Statement(s)		
Credit Cards		
Savings Account Information & Statement(s)		
Money Market Account Statement(s)		
CDs		
HSA and FSA Accounts		
Promissory Notes		
Outstanding Loans		

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Assets - Real Estate and Ownership Documents



Your representative may need access to proof of ownership documents such as the deed to your house and vehicle titles or contracts such as a sale of property.

Document Type	Location/Notes
Mortgage Documents	
Real Estate Deeds	
Lease/Rental Agreements	
Buy/sell or Partnership Agreements	

»» If there is one thing I want you to remember about money (and any future inheritance you may receive), it would be:

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Assets - Personal Items

Document Type	Notes (Which Vehicle, Expiration, Where to find the document, Etc.)
Vehicle Title and/or registration	
Inventory of Valuable Items	Location of inventory:
Appraisals for valuable items	Location of appraisals:
Safe Deposit Box	Location: Combination:
Safe	Location: Combination:

»»» *Memories or instructions about personal items or family heirlooms you should know:*

PHONES, TABLETS, KINDLES, COMPUTERS

Device Type	Unlock Method (PIN, fingerprint, face ID, password)	Where it's Stored/Notes

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Paperwork for Final Arrangements

Document Name	Notes
Cemetery Plot Deed or Pre-paid Cremation Documents	
Pre-planning or Pre-Paid Expenses	
Location, Officiant (ex. church, funeral home, other)	
Funeral Home Preference/Info. (Note: You are not legally required to use a funeral home to plan and conduct a funeral.)	
Cemetery Preference/Info.	
Type of Service (ex. traditional funeral, memorial service, celebration of life)	
Pallbearers	
Music, Readings	
Notes for the Obituary	

Once you've completed the pieces of the organizer that are important to you, there are a few simple ways to help make sure it's useful when needed:

- Keep it in a secure but accessible place like a fireproof safe, filing cabinet, or encrypted digital folder.
- Let a trusted person know where you keep it.
- Keep it up to date. Set a reminder to revisit and update when things change or at regular intervals.

Next review date: _____

Next review date: _____

Next review date: _____

Next review date: _____

