



**PERSONAL RECORD of FINANCIAL INFORMATION (continued)**

Upon completion of this document, let a trusted family member or a personal representative know where it might be found in the event that it is needed.

**FOR MORE INFORMATION, PLEASE CONTACT:**

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**ACCOUNTS RECEIVABLE**

Leases or land contracts

Loans or notes payable to you

**TITLES AND DEEDS TO REAL ESTATE, VEHICLES, BOATS, ETC.**

Document Location

**INSURANCE POLICIES** (life, health, property, vehicles, etc.)

Policy	Company
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Policy	Company
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Policy	Company
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Document Locations

**RETIREMENT ACCOUNTS** (employer plans, IRAs, 401Ks, etc.)

Notes

Document Locations

**COPIES OF PRIOR INCOME TAX RETURNS**

Notes

Document Locations

**BIRTH AND MARRIAGE CERTIFICATES**

Document Location

**WILLS, TRUSTS, POWERS OF ATTORNEY**

Document Location

**FUNERAL ARRANGEMENTS**

Notes

Document Location

**IMPORTANT NAMES AND TELEPHONE NUMBERS**

Accountant

Attorney

Investment Advisor(s)

Insurance Agent

Pastor/Church Affiliation