

PERSONAL INFORMATION RECORD

1. Names and Social Security Numbers of all immediate family members:

2. Name and location of insurance policies:

3. Location of bank records:

4. Location of investment records:

5. Location/address of safe deposit box:

6. Location of safe deposit key:

7. Location of wills and living wills:

It is a good idea to update this document annually. This document was last updated:

Date: _____ Name: _____