



## Personal Record System

**CLIENT 1:**

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**CLIENT 2:**

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Center for Financial Planning, Inc.® has prepared this document intending to be a practical listing of personal and financial information and the whereabouts of documents that would be needed by an executor or other person called upon to administer the client(s)'s affairs in the event of a prolonged absence, illness or death. This document pairs well with the Letter of Last Instruction and is not a legal document.

### You may use this system two ways.

**1** The first is simply to print off this PDF document and fill in the information by hand.

- or -

**2** We encourage you to use the second method, which is to save the document on your own computer where you may then fill it in and more easily update it periodically.

This PDF document is an interactive form, which means you can simply open the document in Adobe Acrobat Reader which is a free program and can be downloaded at [www.adobe.com](http://www.adobe.com). We do recommend having the latest available download when completing this form.

We suggest you update this information at least annually. Many clients find tax time is an opportune time to do this. The Center would be happy to securely store this document along with your other financial records.



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*Note: See Letter of Last Instruction for name of Attorney, Name of CPA, Name of Financial Planner*

**COPIES OF DOCUMENTS**

Client 1 name: \_\_\_\_\_

Client 2 name: \_\_\_\_\_

This revision date(mm/dd/yyyy): \_\_\_\_\_

Location of original Letter of Last Instruction: \_\_\_\_\_

Location of original Personal Record System: \_\_\_\_\_

**COPIES ARE HELD BY:**

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

**PHYSICIANS AND HEALTH CARE PROVIDERS**

**PRIMARY CARE PHYSICIAN: Client 1**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Online portal website: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**PRIMARY PHYSICIAN: Client 2**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Online portal website: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**SAFETY DEPOSIT BOX**

Box #: \_\_\_\_\_ Located at: \_\_\_\_\_

Telephone #: \_\_\_\_\_

**AUTHORIZED SIGNERS:**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

**LOCATION OF KEYS:** \_\_\_\_\_

**SUMMARY OF SAFETY DEPOSIT CONTENTS:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



**CREDIT CARDS**

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**CREDIT CARDS** *(continued)*

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_ Type (Visa, etc): \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone #: \_\_\_\_\_

Account #: \_\_\_\_\_ Exp: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**MORTGAGE AND OTHER DEBT**

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Institution / person: \_\_\_\_\_ Type: \_\_\_\_\_

Pay-off date: \_\_\_\_\_ Phone #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_





**INCOME TAX** Where Financial Records are Kept

**STATE & FEDERAL TAX RETURNS (AND SUPPORTING DOCUMENTATION)**

Most recent year: \_\_\_\_\_

Previous years: \_\_\_\_\_

Ongoing/pre tax filing information: \_\_\_\_\_

**AUTO, RV, BOAT TITLE(S)**

**TITLE AND REGISTRATION:**

1. Year / Make / Model: \_\_\_\_\_

Title location: \_\_\_\_\_

Registration name: \_\_\_\_\_

2. Year / Make / Model: \_\_\_\_\_

Title location: \_\_\_\_\_

Registration name: \_\_\_\_\_

3. Year / Make / Model: \_\_\_\_\_

Title location: \_\_\_\_\_

Registration name: \_\_\_\_\_

4. Year / Make / Model: \_\_\_\_\_

Title location: \_\_\_\_\_

Registration name: \_\_\_\_\_

5. Year / Make / Model: \_\_\_\_\_

Title location: \_\_\_\_\_

Registration name: \_\_\_\_\_



**PROPERTY TITLE(S)**

**LOCATION OF PROPERTY TITLE(S) AND DEED(S):**

Primary Residence: \_\_\_\_\_

Other Property Address: \_\_\_\_\_

Location of Title and Deed: \_\_\_\_\_

Other Property Address: \_\_\_\_\_

Location of Title and Deed: \_\_\_\_\_

Other Property Address: \_\_\_\_\_

Location of Title and Deed: \_\_\_\_\_

**ESTATE DOCUMENTS**

**WILLS**

Name on will: \_\_\_\_\_

Dated: \_\_\_\_\_

Location of original: \_\_\_\_\_

Location of copy(ies): \_\_\_\_\_

Name on will: \_\_\_\_\_

Dated: \_\_\_\_\_

Location of original: \_\_\_\_\_

Location of copy(ies): \_\_\_\_\_



**ESTATE DOCUMENTS** *(continued)*

**TRUSTS**

Name of trust (include date): \_\_\_\_\_

Location of original: \_\_\_\_\_

Location of copy(ies): \_\_\_\_\_

Name of trust (include date): \_\_\_\_\_

Location of original: \_\_\_\_\_

Location of copy(ies): \_\_\_\_\_

**DURABLE POWERS OF ATTORNEY**

Name on Durable Powers of Attorney: \_\_\_\_\_

Dated: \_\_\_\_\_

Location: \_\_\_\_\_

Name on Durable Powers of Attorney: \_\_\_\_\_

Dated: \_\_\_\_\_

Location: \_\_\_\_\_

**LIFE INSURANCE POLICIES**

Company name: \_\_\_\_\_

Insured: \_\_\_\_\_

Policy #: \_\_\_\_\_

Face Amount (\$\$): \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name (if any): \_\_\_\_\_ Phone: \_\_\_\_\_



**LIFE INSURANCE POLICIES** *(continued)*

Company name: \_\_\_\_\_

Insured: \_\_\_\_\_

Policy #: \_\_\_\_\_

Face Amount (\$\$): \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name (if any): \_\_\_\_\_ Phone: \_\_\_\_\_

Company name: \_\_\_\_\_

Insured: \_\_\_\_\_

Policy #: \_\_\_\_\_

Face Amount (\$\$): \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name (if any): \_\_\_\_\_ Phone: \_\_\_\_\_

Company name: \_\_\_\_\_

Insured: \_\_\_\_\_

Policy #: \_\_\_\_\_

Face Amount (\$\$): \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name (if any): \_\_\_\_\_ Phone: \_\_\_\_\_



## HOMEOWNERS INSURANCE

### PRIMARY RESIDENCE

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Property address: \_\_\_\_\_

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Property address: \_\_\_\_\_

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**AUTO INSURANCE**

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**LONG TERM CARE INSURANCE**

Company name: \_\_\_\_\_

For whom: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_

For whom: \_\_\_\_\_

Policy #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**HEALTH INSURANCE**

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**DISABILITY INSURANCE**

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Person covered: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Person covered: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**OTHER INSURANCE** Property / Umbrella liability / Boats / RV's, etc.

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Policy/ID #: \_\_\_\_\_

Location of policy: \_\_\_\_\_

Agent name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_





**PERSONAL DOCUMENTS**

**SOCIAL SECURITY**

Name on card: \_\_\_\_\_

Number: \_\_\_\_\_ Location of card: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on card: \_\_\_\_\_

Number: \_\_\_\_\_ Location of card: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**DRIVER'S LICENSES**

Name on license: \_\_\_\_\_

DL#: \_\_\_\_\_ Location of license: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name on license: \_\_\_\_\_

DL#: \_\_\_\_\_ Location of license: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**PASSPORTS:**

Name on passport: \_\_\_\_\_

Passport#: \_\_\_\_\_ Location of passport: \_\_\_\_\_

Name on passport: \_\_\_\_\_

Passport#: \_\_\_\_\_ Location of passport: \_\_\_\_\_



**PERSONAL DOCUMENTS** *(continued)*

**BIRTH CERTIFICATES:**

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Location of certificate: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Location of certificate: \_\_\_\_\_

**OTHER DOCUMENT:**

Type of Document: \_\_\_\_\_

Location: \_\_\_\_\_

**OTHER DOCUMENT:**

Type of Document: \_\_\_\_\_

Location: \_\_\_\_\_

**OTHER DOCUMENT:**

Type of Document: \_\_\_\_\_

Location: \_\_\_\_\_

**OTHER DOCUMENT:**

Type of Document: \_\_\_\_\_

Location: \_\_\_\_\_

**OTHER DOCUMENT:**

Type of Document: \_\_\_\_\_

Location: \_\_\_\_\_



**BANK ACCOUNTS / CREDIT UNIONS / CDS**

**CHECKING, SAVINGS, MONEY MARKET, ETC:**

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of bank: \_\_\_\_\_ Acct #: \_\_\_\_\_

Account owner(s): \_\_\_\_\_ Type of Account: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_



**INVESTMENTS BROKERAGE ACCOUNTS**

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**INVESTMENTS BROKERAGE ACCOUNTS** *(continued)*

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Financial Planner / Broker Name: \_\_\_\_\_

Brokerage Firm Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Account owner(s) and number(s): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**DIRECTLY-OWNED INVESTMENTS / STOCK CERTIFICATES**

**CLIENT 1**

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**DIRECTLY-OWNED INVESTMENTS / STOCK CERTIFICATES** *(continued)*

**CLIENT 2**

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Name of investment: \_\_\_\_\_

Type of investment: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**PENSION AND RETIREMENT BENEFITS**

**CLIENT 1**

Retirement ID: \_\_\_\_\_ Contact (if any): \_\_\_\_\_

Phone #: \_\_\_\_\_ Website: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Retirement ID: \_\_\_\_\_ Contact (if any): \_\_\_\_\_

Phone #: \_\_\_\_\_ Website: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

**CLIENT 2**

Retirement ID: \_\_\_\_\_ Contact (if any): \_\_\_\_\_

Phone #: \_\_\_\_\_ Website: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Retirement ID: \_\_\_\_\_ Contact (if any): \_\_\_\_\_

Phone #: \_\_\_\_\_ Website: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_





**401(K) / 403 (B) RETIREMENT ACCOUNTS**

**CLIENT 1**

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**401(K) / 403 (B) RETIREMENT ACCOUNTS** *(continued)*

**CLIENT 2**

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_

Plan Administrator (name of company): \_\_\_\_\_

Phone #: \_\_\_\_\_ PIN #: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person (if any): \_\_\_\_\_

Account number(s) if applicable: \_\_\_\_\_

Location of statements / documents: \_\_\_\_\_

Online username: \_\_\_\_\_ Password: \_\_\_\_\_



**ONLINE ACCOUNTS: COMMONLY ASKED SECURITY QUESTIONS AND ANSWERS**

**CLIENT 1**

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_



**ONLINE ACCOUNTS: COMMONLY ASKED SECURITY QUESTIONS AND ANSWERS** *(continued)*

**CLIENT 1**

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_



**ONLINE ACCOUNTS: COMMONLY ASKED SECURITY QUESTIONS AND ANSWERS** *(continued)*

**CLIENT 2**

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_



**ONLINE ACCOUNTS: COMMONLY ASKED SECURITY QUESTIONS AND ANSWERS** *(continued)*

**CLIENT 2**

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_

Question: \_\_\_\_\_

Answer: \_\_\_\_\_



**ONLINE ACCOUNTS: E-MAIL**

**CLIENT 1**

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

**CLIENT 2**

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_

e-Mail address: \_\_\_\_\_ Password: \_\_\_\_\_

Notes: \_\_\_\_\_



**ONLINE ACCOUNTS: SOCIAL MEDIA (FACEBOOK, TWITTER, LINKEDIN, PINTEREST, ETC.)**

**CLIENT 1**

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_





**ONLINE ACCOUNTS: SOCIAL MEDIA (FACEBOOK, TWITTER, LINKEDIN, PINTEREST, ETC.)**

**CLIENT 2**

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

Platform: \_\_\_\_\_

Handle: \_\_\_\_\_

Password: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_



**ONLINE ACCOUNTS: HOUSEHOLD**

**ELECTRIC, GAS, WATER, CABLE, INTERNET, PHONE, ETC.**

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Utility company: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cable / Internet: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cable / Internet: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cable / Internet: \_\_\_\_\_ Acct #: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_



**ONLINE ACCOUNTS: HOUSEHOLD** *(continued)*

**ELECTRIC, GAS, WATER, CABLE, INTERNET, PHONE, ETC.**

Cell phone provider: \_\_\_\_\_

Cell phone account (or phone)#: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cell phone provider: \_\_\_\_\_

Cell phone account (or phone)#: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cell phone provider: \_\_\_\_\_

Cell phone account (or phone)#: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Other: \_\_\_\_\_ Acct #: \_\_\_\_\_

Website: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Other: \_\_\_\_\_ Acct #: \_\_\_\_\_

Website: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Other: \_\_\_\_\_ Acct #: \_\_\_\_\_

Website: \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

## ONLINE ACCOUNTS: INDIVIDUAL

### SHOPPING, LEARNING, SPORTS, SUBSCRIPTIONS, ETC.

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_



**ONLINE ACCOUNTS: INDIVIDUAL**

**SHOPPING, LEARNING, SPORTS, SUBSCRIPTIONS, ETC.**

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_



**ONLINE ACCOUNTS: INDIVIDUAL**

**SHOPPING, LEARNING, SPORTS, SUBSCRIPTIONS, ETC.**

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_



**ONLINE ACCOUNTS: INDIVIDUAL**

**SHOPPING, LEARNING, SPORTS, SUBSCRIPTIONS, ETC.**

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_

Website: \_\_\_\_\_

Account Owner: \_\_\_\_\_

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Notes: \_\_\_\_\_



**OTHER IMPORTANT INFORMATION**

**FREQUENT-FLYER PROGRAMS**

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_

Passenger name: \_\_\_\_\_

Airline: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated "frequent flyer" miles to: \_\_\_\_\_





**OTHER IMPORTANT INFORMATION** *(continued)*

**HOTEL REWARDS PROGRAMS**

Name(s) on account: \_\_\_\_\_

Hotel: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated rewards points to: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Hotel: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated rewards points to: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Hotel: \_\_\_\_\_ Account #: \_\_\_\_\_

I wish to donate accumulated rewards points to: \_\_\_\_\_

**MEMBERSHIPS (COSTCO, AAA, GYM, ETC)**

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_



**MEMBERSHIPS (COSTCO, AAA, GYM, ETC) (continued)**

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_

Type of membership: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account/membership number: \_\_\_\_\_ Phone number: \_\_\_\_\_

**PROFESSIONAL LICENSES**

Type of license: \_\_\_\_\_

Name(s) on license: \_\_\_\_\_

Professional License/Registration #: \_\_\_\_\_ Expiration date: \_\_\_\_\_

Type of license: \_\_\_\_\_

Name(s) on license: \_\_\_\_\_

Professional License/Registration #: \_\_\_\_\_ Expiration date: \_\_\_\_\_

Type of license: \_\_\_\_\_

Name(s) on license: \_\_\_\_\_

Professional License/Registration #: \_\_\_\_\_ Expiration date: \_\_\_\_\_



---

## EVERYTHING ELSE

MEDICATIONS, PIN NUMBERS, COMPUTER PASSWORDS, ARMED FORCES PAPERWORK,  
CELL PHONE PASSCODES, COMBINATIONS TO LOCKS AND SAFES, PIN NUMBERS, ETC.



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## **EVERYTHING ELSE**

**MEDICATIONS, PIN NUMBERS, COMPUTER PASSWORDS, ARMED FORCES PAPERWORK,  
CELL PHONE PASSCODES, COMBINATIONS TO LOCKS AND SAFES, PIN NUMBERS, ETC.**



Center for **Financial Planning**, Inc.®

## PERSONAL RECORD SYSTEM



### **EVERYTHING ELSE**

**MEDICATIONS, PIN NUMBERS, COMPUTER PASSWORDS, ARMED FORCES PAPERWORK,  
CELL PHONE PASSCODES, COMBINATIONS TO LOCKS AND SAFES, PIN NUMBERS, ETC.**