

**This directory should be completed by you as a reference for you and as a guide to your family and your representatives in the event of your death.**

We recommend that the original of this directory be retained with the Financial Counseling Report and that you provide copies of the directory to the members of your family and to your attorney or other advisor. It will be important to update this information from time to time.

Accountant(s)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Attorney(ies)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Bank(s) and Officer(s)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Executor or Executrix	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update

# Directory of Vital Contacts

Financial Advisor(s)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Other Advisor(s)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Life Insurance Agent	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Investment Broker	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update
Trustee(s)	
Name(s): _____ Organization: _____ Address: _____ Phone: _____ Fax: _____ Website: _____ Email Address: _____	Date/Change Update

# Directory of Vital Documents

The following is a list of important documents. Please make notes of any you might have and a brief description including content and location if needed.

## Family Documents

Birth Certificates		
Belongs to	Document Location	Notes
Adoption Papers		
Belongs to	Document Location	Notes
Marriage Certificate(s)		
Belongs to	Document Location	Notes
Marriage Certificate(s)		
	Document Location	Notes
Child Support:		
Alimony:		
Other:		
Other:		

# Directory of Vital Documents

Family Doctor(s)		
Belongs to	Location	Notes

  

Family Employees		
Role	Contact Information	Notes

  

Funeral Arrangements		
Funeral documents	Document Location	What still needs to be done

## Property Documents

Automobile Titles		
Vehicle	Document Location	Notes

  

Backup Keys		
Opens:	Key Location	Notes

# Directory of Vital Documents

<b>Deeds, Mortgages, Etc.</b>		
Document	Document Location	Notes
<b>Major Purchases</b>		
Item	Document/Warranty Location	Notes
<b>Credit Cards</b>		
Institution	Account Number	Notes
<b>Security Companies</b>		
Company	Account Number	Notes
<b>Personal Assets</b>		
	Location	Notes
Photographic Inventory		
Safe Deposit Boxes		
Other		

# Directory of Vital Documents

## Legal/Government Documents

Citizenship Papers		
	Location	Notes
Immigration Papers		
	Location	Notes
Guardianship Papers		
	Location	Notes
Military Service Papers		
	Location	Notes
Legal Documents		
	Location	Notes
Durable Power of Attorney		
Financial Power of Attorney		
Durable Power of Attorney (Health)		
Living Will		
Will & Memo regarding distribution of personal effects		

# Directory of Vital Documents

## Financial Documents

Financial Statements		
	Location	Notes
Insurance Policies		
	Location	Notes
Property		
Health		
Medicare		
Disability		
Other		
Life Insurance Policies		
Company	Location	Notes
Tax Return Papers		
	Location	Notes
Other Documents		
	Location	Notes