Personal Records

A form to help you keep track of your loved one's personal records and other important information.

Personal Records and Important Documents of

(your loved one's name)

Last Will and Testament
Location: _____
Attorney's name/Phone No.: _____

Doctors:
Primary Care-Name/Phone No.: _____

Other Specialists:

Name/Phone No.: _____
Name/Phone No.: _____

Social Security Number: _____
Contact regarding information and benefits: _____

Insurance Policies:
Location: _____

Name of Ins Co.	Phone No.	Policy No.	Beneficiary	Value

Burial Policy/Funeral Plan.
Location: _____
Contact/Phone No.: _____

Cemetery Property
Ownership certificate location: _____

Birth Certificate
Location: _____
Name on
Certificate: _____
Date of Birth:
_____   City/County: _____   State: _____

Father's Name: _____
Mother's Name: _____

Marriage License
Location: _____

For additional tools for caregiving or aging, visit www.CaregiversLibrary.org

Wedding: _____   City/County: _____ State _____

Divorce Records
Location: _____
Attorney's
Name/Phone: _____

Military Records
Location: _____
Military ID No.: _____   Veterans Benefits/Info.: _____
Military Retirement Benefits
(Branch of Military Contact Phone No.):   _____

Assets:
Checking, Savings, CD Accounts

	Account Number	Name on Account	Branch Location
Checking			
Checking			
Savings			
Savings			
CDs			

Safe Deposit Box
Location: _____
Key Location: _____
Contents: _____
                    _____

Retirement, 401(k) and/or IRA Documents
Contact/Phone No.:   _____
Contact/Phone No.:   _____

Investments—Stocks and Bonds
Location: _____

Deed to House/Other property and Mortgage Info
Location::   _____
Mortgage Co. Name/Policy No.:   _____
Contact/Phone No.:   _____

Automobile Ownership
Title(s) Location: _____

Vehicle ID No.	Year	Make	Model

Other Vehicle (truck, motor home, boat)
Title(s) Location: _____

Vehicle ID No.	Year	Make	Model

Other Assets
Description: _____
Location of Important Documents: _____

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Debts

Credit Cards

Location: _____

Credit Card Co.	Name on Account	Account No.	Contact Phone No.

Loans

Type of Loan	Contact Phone No.	Documents Located

Tax Records

Location: _____

Accountant's Name/Phone No.: _____