Personal information organizer

Your key information in one place

Keep essential info at your fingertips

In an emergency, you and your family members need to be able to locate important information and documents quickly. This personal info organizer is designed to help you put account details and other documentation in one place.

Fill out each section and keep this organizer in a secure location.

Review the beneficiary information on your accounts and make sure they reflect your intended plans.

Be sure to let a loved one or the executor of your estate know where this organizer is stored and how to access it.

Review and update the planner yearly and after major life changes to keep it current (for example, after having children or getting divorced).

Pro tip: Consider using the information to help you answer questions and set goals in My Income & Retirement Planner℠. You'll find this digital retirement and financial planning tool inside your retirement account.

Personal information

Your name:
Birthdate and birthplace:
Social Security number:
Current employer:
Address:
Spouse/partner's name:
Birthdate and birthplace:
Social Security number:
Current employer:
Address (if different):

Family member information

Name/relationship:
Birthdate:
Address/phone number:
Name/relationship:
Birthdate:
Address/phone number:
Name/relationship:
Birthdate:
Address/phone number:
Name/relationship:
Birthdate:
Address/phone number:

Emergency information

Medical information	Name/address	Phone number
Preferred hospital		
Doctors		
Dentist		
Health insurance		
Policy number		

Retirement accounts

Account type	Account number	Financial institution/trustee	Phone number	Beneficiary name(s)
401(k), 403(b), 457(b) plans and other workplace plans				
IRAs				
Pension				
Social Security			ssa.gov 1-800-772-1213	
Other				

Regular financial accounts

Financial firm's name/address	Account/ID number	In whose name
Checking accounts		
Savings accounts		
Certificates of deposit and money market certificates		
Trust accounts		
Safe-deposit boxes		

Other investments | List additional investments such as mutual funds and education accounts.

Company and asset/fund	Account number	Contact information	Owner/beneficiary

Outstanding liabilities | List current debts such as mortgages, credit cards and student loans.

Type	Creditor/company name	Creditor phone number/address	Account number

Life insurance and annuities

Person insured	Type	Face value	Policy number	Beneficiary name(s)	Insurance company

Family advisors

Type of advisor	Name	Phone number	Address (postal/email)
Accountant/tax preparer			
Executor of estate			
Attorney			
Banker			
Financial planner/ investment advisor			
Insurance agent(s)			
Employer benefits office			

Valuable papers
Under “Location,” clearly describe where you keep specific documents (such as a locked drawer, safe or safe-deposit box).

Document type	Location
Marriage license/family birth certificates	
Will/trust and powers of attorney	
Mortgage papers/real estate deeds	
Homeowners insurance policies	
Motor vehicle insurance policies	
Life insurance policies	
Motor vehicle title(s)	
Passports	
Military service papers	
Other	
Other	

Digital information
Update this section frequently, especially when you change your passwords or security codes.

Passwords/security codes	
Account or device	Password/security code

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