

Compiling Your Important Information

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This publication should be completed as part of your Emergency Grab-and-Go Bag. See publication W 224 (extension.tennessee.edu/publications/Documents/W224.pdf) for additional information.

Taking time to organize your important papers and records may be the best investment you have ever made. Completing the document will:

- Help you organize and document your household and personal records.
- Serve as a ready resource for you when you need to access important documents or information.
- Provide important information to a friend or family member who might need to take care of your affairs in an emergency.

After you've completed this document for your home files, make sure that every adult member of the household can locate it if needed. Prepare duplicates for one or more of the following:

- Your safe deposit box.
- Safekeeping with a trusted friend or family member.
- A grab-and-go bag for evacuation.

Review and revise this information annually or as needed to update the information.

When completed, this document will contain important information that you will want to protect. Be sure to store this document in a safe location in your home. Only let your friend(s) or family member(s) who might need to take care of your affairs in an emergency know its location.

Family Members

Name	Date of Birth	Place of Birth	Social Security Number

Emergency Contacts Not Residing Within the Family

Name	Address – Phone Number – Email

Powers of Attorney (*health care, financial power of attorney*)

Principal	Agent	Agent Address – Phone Number – Email

Executors of Wills

Testator	Executor	Executor Address – Phone Number – Email

Family Advisors (*clergy, doctors/specialists, dentists, veterinarians, accountants, bankers, brokers, financial advisors, attorneys, insurance agents/type of policy*)

Family Member	Advisor	Advisor Address – Phone Number - Email

Family Advisors (cont.)

Employment/Military Records

Family Member	Dates of Employment	Name of Employer/ Contact Information	Other Information (Circumstances of Separation, Recognition, Location of Military Records)

School Records (*immunization records, report cards, standardized test results, diagnostic test results*)

Family Member	Type of Record Test	Other Information (Date, Service Provider, Location of Records, Follow-up)

Personal Financial Investments (*personal IRAs or Roths, education saving accounts, savings bonds, government securities, mutual funds, stocks, bonds, other*)

Investment	Account Number	Name of Contact	Estimated Value	Other Information (Name of Owner, Number of Shares, Maturity Date)

Pensions or Employee Retirement Plans *(Include 401K, 403B, 457, Roth, SEP, SIMPLE or KEOGH)*

Type of Account	Account Holder	Employer or Investment Company	Account Number	Dates Enrolled	Estimated Current Value	Estimated Monthly Payment

Real Estate (“Type of Ownership” refers to the legal form of ownership, such as tenancy in common or joint tenancy.)

Kind of Property	Address or Location	Name(s) of Owner(s)	Type of Ownership	Date Acquired	Purchase Price

Business Interests (“Held as” refers to whether you hold the business as sole owner or in a partnership or corporate arrangement.)

Business	Contact Name and Information	Position in the Company	Held As	Date Acquired	Estimated Value of Your Interest

Other Personal Property (Autos, boats, mobile homes, RVs and other items of value [jewelry, antiques, books, collections, royalties, patents, etc.]. Attach photos, video and electronic records and descriptions as appropriate.)

Name of Asset	Date Acquired	Purchase Value	Other Useful Information (Name of Owner, VIN Number, Appraisals, etc.)

Property Insurance (Real estate, automobiles, other personal property, personal liability, other)

Insurer	Amount of Coverage	Policy Number	Contact Information

Health Insurance *(health and hospitalization, dental, vision, prescription drugs, disability, long-term care. Include employer plans, Medicare, Medicaid [or other government plans – accidental, major medical, special coverage and high-deductible plans.] List prescription drugs and pharmacy for each family member in table below.)*

Insurer	Person(s) Insured	Policy Number	Contact for Authorization Phone/Internet Address	Other Information (amount of deductible, copays, out-of-pocket limits, etc.)

Prescription Medications

Family Member	Medication/Dosage	Pharmacy	Prescription Number	Insurer

Debit, Credit and Charge Cards *(A list of debit, credit and charge card numbers along with PINs and online account information should be kept in a safe deposit box.)*

Card	Authorized User(s)	Date Opened	Phone Number

Financial Obligations *(first/second mortgages, home equity loans, other real estate loans, rental agreements, auto loans, educational loans, debt consolidation loans, personal property loans, loans from retirement funds or life insurance, child support, alimony, loans from family/friends, other)*

Creditor/Contact Information	Monthly Payment/Due Date	Anticipated Payoff Date	Automatic Draft? Y/N	Account for Draft

Financial Obligations (cont.)

Creditor/Contact Information	Monthly Payment/Due Date	Anticipated Payoff Date	Automatic Draft? Y/N	Account for Draft

Service Providers *(utilities, telephones/cell phones, cable, internet, pest control, cleaning, lawn care, other)*

Service	Company/Contact Information	Term of Contract	Other Information (Frequency, Cost, Deposit, etc.)

Employer Flexible Benefits Plans *(health savings, dependent care)*

Type of Plan	Employer/Contact Information	Monthly Contribution

Location of Important Items

Name of Family Member					
Location for Each Family Member					
ATM Cards					
Emergency contact information					
Medical information (blood type, allergies, diseases, hospital and doctor preferences)					
Debit cards					
Credit cards used regularly (list location of other credit cards below)					
Purchase or gift cards					
Health insurance cards					
Membership cards (AAA, AARP, purchase club, health club, etc.)					
Personal professional identification cards					
Drivers licenses					
Auto registration					
Proof of auto insurance					
Social Security card					

Name of Family Member					
Location for Each Family Member					
Employment records					
Resumes and/or vitae					
Copies of diplomas, professional certificates and licenses					
Immunization records					
School records					
Copies of military service and discharge papers					
Organizational membership records					
Service contracts					
Guarantees and warranties					
Current bills					
Payment records					
Net worth statements					
Tax records					
Pay stubs					
Employee reimbursement records					
Record of flexible benefit contributions and reimbursements					
Record of insurance claims and payments					
Credit reports					
Consumer loan agreements					
Mortgage loan agreements					
Chapter 13 bankruptcy plan					
Credit cards not often used					
Child support or alimony court orders					
Record of child support or alimony payment					
Wills and estate plan					
Trusts					
Power of Attorney					

Name of Family Member					
Location for Each Family Member					
Birth certificates					
Marriage certificates					
Death certificates					
Adoption papers					
Divorce decrees and agreements					
Prenuptial agreements					
Citizenship papers					
Military service records					
Employment contracts and business agreements					
Bankruptcy discharge papers					
Insurance policies					
Real estate deeds					
Vehicle titles					
Stock, bond and other investment certificates					
Jewelry and precious metals (certificates or items)					
Video inventory of home contents					
Web addresses, login and password information for online accounts					
List of debit, credit and charge cards with account numbers and contact information					
Other					

Recommended Locations for Important Documents

Carry With You	
Driver's licenses	Personal contact information
Personal professional identification cards	Emergency contact information (friend or relative)
ATM Cards	Organizational membership cards you use regularly (AAA, AARP, purchase club, etc.)
Debit cards	Auto registration
Credit cards you use regularly	
Other purchase or gift cards	
Health insurance cards	
Medical information (blood type, allergies, diseases, hospital and doctor preferences)	

Home File	
Employment records	Savings and spending plan
Resumes and/or vitae	Spending records
Copies of diplomas, professional certificates and licenses	Paycheck stubs
Immunization and school records	Credit reports
Copies of military service and discharge papers	Employee reimbursement records
Tax records	Record of insurance claims and payments
Guarantees and warranties	Record of flexible benefit contributions and reimbursements
Service contracts	Consumer loan agreements
Organizational membership records	Mortgage loan agreements
Current bills	Chapter 13 bankruptcy plan
Payment records	Child support or alimony court orders
Net worth statements	Credit cards not often used
Social Security cards	

Safe Deposit Box	
Wills and estate plans	Prenuptial agreements
Trusts	Bankruptcy discharge papers
Powers of Attorney	Citizenship papers
Insurance policies	Military service records
Birth certificates	Real estate deeds
Marriage certificates	Vehicle titles
Death certificates	Stock, bond and other investment certificates
Adoption papers	Video inventory of home contents
Divorce decrees and agreements	Jewelry and precious metals
Employment contracts and business agreements	Lists of debit, credit and charge cards with account numbers
Web addresses, login and password information for all online transactions	



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