

**CONTINGENCY INFORMATION FOR:
NAME: _____**

Please utilize the information below in case of death or disability not allowing the above named person to manage her/his financial or legal matters. This is to be kept up to date and placed in a secure place known by the next of kin or POA (Power of Attorney). These important entry paths to banking, investment accounts and other company contracts may need to be contacted for updating or termination.

- 1. All important paper documents are kept:** (suggestion of a bank safety deposit box, and if used, please provide the specific name of the bank address, safety deposit number and location of the key to the box.)

2. Automobiles:

Title(s) Location _____
VIN # _____ VIN # _____
License plate: _____ License plate: _____
Auto Insurance Company: _____ Phone # _____
Policy # _____
Loan information (if not owned outright) _____

3. Credit cards:

Card company: _____
Name on Card: _____
Account # _____ 3 digit # on Back: _____
Expiration Date: _____ User Name: _____
Password: _____
Repeat this for all cards.

4. Cell Phone:

Phone number: _____ Cell phone company: _____
Security Code to access phone: _____
Account Username and Password: _____

5. Home Phone / WiFi:

Company: _____ Phone #: _____
Username and password: _____
Security Question/Answers: _____

6. Home Television Companies / Streaming Services:

Company: _____ Act #: _____

Username / Password: _____

7. CPA / Tax Specialist:

Name: _____ Phone: _____

8. Email Accounts:

Username / Password: _____

9. Social Security # _____

10. Investments:

Company: _____ Phone: _____

Account or User info: _____ Password: _____

11. Insurance:

Personal Life Insurance: Company, Account and Security Info:

Health Insurance: Company, Account and Security Info:

12. Retirement Accounts: _____

13. Bank Accounts: All accounts with account numbers, user name & passwords:

The next of kin or power of attorney should be a co-signature for account:

14. Real Estate:

Location of deeds of ownership: _____

Holder of mortgage: _____

15. Will or Inheritance Information, such as Legal Trust:

Location: _____

16. Attorney / Legal Representative: Name and contact information:

17. Monthly subscriptions: magazine, apps, music services, recurring purchases:

18. Updated list of the contents of the safety deposit box and home safe with combination (if in use): _____

See below for suggestions of what to keep safe

1. Will;
2. Health Care Directive;
3. Insurance Policies;
4. Burial Instructions;
5. List of special requests;
6. Property and casualty insurance policies;
7. Loan agreements not yet satisfied;
8. Real Estate Title and Deed;
9. Birth Certificates;
10. Passports;
11. Auto Titles;
12. Social Security Card;
13. Precious metals;
14. Computer thumb drive which contains a list of personal property or a video of your home environment including: art work, furniture, open view of closets, drawers, home safe, storage units and garage contents.