PERSONAL RECORD OF FINANCIAL INFORMATION

AN ORGANIZED RECORD OF YOUR PERSONAL AND FINANCIAL INFORMATION IS ONE OF THE BEST GIFTS YOU CAN GIVE YOUR FAMILY IN AN EMERGENCY OR UPON YOUR DEATH.

This checklist is meant to help you keep your personal and financial information organized during your lifetime and is not intended to be used in place of other estate planning tools. Be sure to seek the advice of your personal estate and financial planning professional with any questions that you may have.

McLaren NORTHERN MICHIGAN FOUNDATION

❍ CHECKBOOK AND CHECKING ACCOUNT STATEMENTS

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Document Locations ____________

❍ SAVINGS ACCOUNT STATEMENTS

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Document Locations ____________

❍ CERTIFICATES OF DEPOSIT

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Bank ____________ Acct # ____________

Document Locations ____________

❍ SAFE DEPOSIT BOXES

Bank/Branch ____________ Box # ____________

Bank/Branch ____________ Box # ____________

❍ BROKERAGE AND MUTUAL FUND STATEMENTS

Firm ____________ Acct # ____________

Firm ____________ Acct # ____________

Firm ____________ Acct # ____________

Document Locations ____________

❍ STOCK CERTIFICATES

Notes ____________

Document Locations ____________

❍ MORTGAGES AND OTHER INDEBTEDNESS

Notes ____________

Document Locations ____________

❍ ACCOUNTS RECEIVABLE

Leases or land contracts ____________

Loans or notes payable to you ____________

PERSONAL RECORD OF FINANCIAL INFORMATION *(continued)*

Upon completion of this document, provide a copy to a trusted family member or identify where it might be found in the event that it is needed

FOR MORE INFO PLEASE CONTACT:

Jennifer Doumanian, MPA
Planned Giving Officer

MCLAREN NORTHERN MICHIGAN FOUNDATION
360 Connable Avenue
Petoskey, MI 49770
Office: 231.487.5020
Cell: 231.373.4662

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McLaren
NORTHERN MICHIGAN FOUNDATION

❍ TITLES AND DEEDS TO REAL ESTATE, VEHICLES, BOATS, ETC.

Notes

Document Locations

❍ WILLS, TRUSTS, POWERS OF ATTORNEY

Notes

Document Locations

❍ BIRTH AND MARRIAGE CERTIFICATES

Notes

Document Locations

❍ FUNERAL ARRANGEMENTS

Notes

Document Locations

❍ INSURANCE POLICIES (life, health, property, vehicles, etc.)

Policy Company

Policy Company

Policy Company

Policy Company

Policy Company

Document Locations

❍ RETIREMENT ACCOUNTS (employer plans, IRAs, 401Ks, etc.)

Notes

Document Locations

❍ COPIES OF PRIOR INCOME TAX RETURNS

Notes

Document Locations

❍ NAMES AND TELEPHONE NUMBERS

Accountant

Attorney

Investment Adivsor(s)

Insurance agent

Pastor/Church Affiliation