

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 OR PERSONAL REPRESENTATIVE IN THE EVENT OF 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 for you to share or 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.

CHECKBOOK AND CHECKING ACCOUNT STATEMENTS

Bank _____ Acct # _____

Bank _____ Acct # _____

Document Locations _____

SAVINGS ACCOUNT STATEMENTS

Bank _____ Acct # _____

Bank _____ Acct # _____

Document Locations _____

CERTIFICATES OF DEPOSIT

Bank _____ Acct # _____

Bank _____ Acct # _____

Document Locations _____

SAFE DEPOSIT BOXES

Bank/Branch _____ Box # _____

BROKERAGE AND MUTUAL FUND STATEMENTS

Firm _____ Acct # _____

Firm _____ Acct # _____

Document Locations _____

STOCK CERTIFICATES

Notes _____

Document Locations _____

MORTGAGES AND OTHER INDEBTEDNESS

Notes _____

Document Locations _____

ACCOUNTS RECIEVABLE

Leases or land contracts _____

Loans or notes payable to you _____

PERSONAL RECORD of FINANCIAL INFORMATION *(continued)*

Upon completion of this document, let a trusted family member or a personal representative know where it might be found in the event that it is needed

**FOR MORE
INFORMATION,
PLEASE CONTACT:**

JENNIFER YELOVINA,
CFRE, CAP®
Planned Giving Officer
360 Connable Ave.
Petoskey, MI 49770
Office: 231-487-5020
Cell: 231-373-4662

*This checklist is published
as a service of McLaren
Northern Michigan
Foundation.*



ACCOUNTS RECEIVABLE

Leases or land contracts _____

Loans or notes payable to you _____

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

Document Location _____

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

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 _____

BIRTH AND MARRIAGE CERTIFICATES

Document Location _____

WILLS, TRUSTS, POWERS OF ATTORNEY

Document Location _____

FUNERAL ARRANGEMENTS

Notes _____

Document Location _____

IMPORTANT NAMES AND TELEPHONE NUMBERS

Accountant _____

Attorney _____

Investment Advisor(s) _____

Insurance agent _____

Pastor/Church Affiliation _____