

# Sample Information Directory

One of the most thoughtful things you can do for your spouse and your children is to create an Information Directory.

This directory should list everything about your personal business from your bank account and credit cards to your insurance policies and burial plots.

The directory should be updated once or twice a year to be sure it is current. Using a pencil to record the data will allow you to change bits of information without starting over again. It should be kept in a safe place.

Your spouse, children, or executor of your will should be informed of this Information Directory and where to find it. At the time of your death, it will be extremely valuable.

You may adjust the information categories to meet your specific needs. Your family will thank you!



## Tips for Using the Information Directory:

- Make a copy of the form for your spouse, unless one copy is sufficient
- Complete the information as soon as possible.
- Review the information annually (pick a date such as New Year's, Memorial Day, Labor Day, etc. to be sure everything is current).
- Put the Information Directory in a safe place; tell your children or the designated executor of your estate where to find it.
- Consider placing the information in a safety deposit box at the bank because it contains confidential information (e.g. credit cards, bank account numbers).
- Suggest to your children to create an Information Directory for their family as well.

Written by Nelda Ammons

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# INFORMATION DIRECTORY

FOR \_\_\_\_\_ DATE \_\_\_\_\_

Category	Details	Location/Agent's Name	Telephone Number
<b>Advisors</b>	Attorneys		
	Stockbroker		
<b>Allergies</b>	To food or medication		
<b>Bank/s</b>	Checking, savings, CDs, etc. (Passbooks & certificates)		
<b>Birth Certificate</b>			
<b>Car #1</b>	Title, keys, registration Insurance Company		
<b>Car #2</b>	Title, keys, registration Insurance Company		
<b>Car #3</b>	Title, keys, registration Insurance Company		
<b>Cemetery</b>	Name, lot numbers, and receipt		
<b>Debts, payable</b>	Mortgage on home		
	Credit Cards		
	Current unpaid bills		
	Other debts		
<b>Debts, receivable</b>	Signed Contracts		
<b>Doctors</b>	Keep current list in wallet and on refrigerator		
<b>Hospital</b>	Your preference		
<b>Income Tax</b>	Last 3 years' records		
<b>Insurance</b>	Cars		
	Dental		
	Home		

Category	Details	Location/Agent's Name	Telephone Number
Insurance Continued	Life		
	Medical		
	Medicare*		
	Medical Supplement		
	Long-Term Care		
	Mortgage		
Investments	Stocks		
	Bonds		
	Trusts		
Key	To Safety Deposit Box		
Living Trust			
Living Will			
Medication List	Carry in your wallet and put one on your refrigerator		
Mortuary	Your preference		
Obituary	Your full name, place of birth, birthdate, survivors, accomplishments, etc.		
Participants (funeral)	Pastor		
	Escorts		
	Singer/s		
Songs	Your favorite songs		
	Musicians		
Power of Attorney	Naming someone to act for you		
Pre-paid Funeral/s	Company & receipts		
Property	Deeds		
	Mortgages		
Purchased Services	Domestic Help or Home Care		
	Standing Hair appt.		
	Lawn Care		
	Magazines		

Category	Details	Location/Agent's Name	Telephone Number
<b>Purchased Services Continued</b>	Memberships in Golf or Health Clubs		
	Newspaper		
	Termite Control		
	Other, _____		
<b>Social Security Card/s*</b>			
<b>Telephone List</b>	Family & friends with full names and phone #s		
<b>Valuables</b>	Collection/s		
	Jewelry		
	Silver and/or China		
	Other		
	Pictures & keepsakes		
<b>Veteran's Office</b>	Flag for coffin or escort/ copy of discharge		
<b>Will</b>	An original and copy		
<b>Other Info</b>			

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\*If your Social Security or Medicare is under your spouse's name, be sure to indicate this and give the full name and number.