

In Case of Emergency - Personal Information

(Leave completed form with your loved ones)

Important Contacts

	<i>Name</i>	<i>Contact #</i>
<i>Moderata Wealth Manager</i>		
<i>Estate Attorney</i>		
<i>CPA</i>		

Safe Deposit Box(es) and Keys:

Bank/Location	Box #	Key Location

Computer Passwords:

Location (Home/work/cell phone)	Login	Password

Inform Estate Executor or Family Member Where To Find Your Important Documents:

Document	Location
Birth Certificate	
Social Security Card	
Military Papers	
Divorce Decree (if applicable)	
Marriage Certificate	
Will	
Trust Documents	
Durable Power of Attorney	
Health Care Power of Attorney	
Living Will	
Organ Donation Card (if applicable)	

List all bank and investment accounts:

Account Name and #	Custodian	Contact Number

List all credit card accounts:

Bank	Account #	Contact Number

Locate papers for all your assets. Mortgage or rental documents, deeds for property, last home appraisal, HUD statements from home purchase and each refinances, receipts for home improvements, vehicle title, and any other information related to current assets.

Asset	Type (title/deed/etc.)	Location

List of Boards or Volunteer Committees to Notify:

Board/Charity/Etc.	Position	Contact Name and #

List all outstanding bills you pay on a regular basis: (Utilities, phone bills, medical payments, real estate taxes, outstanding loans, subscriptions, or memberships.)

Payee	Account #	Contact Name and #

Locate all insurance policies:

Insurance Company	Policy #	Death Benefit	Contact Name and #

Company contact for employer benefits:

Name/Company	Position	Contact #