



FINANCIALFIRSTAIDKITS.COM



YOUR BUDGET WORKSHEET

mybudgetworksheet.com



CREDIT REPORT



SOCIAL SECURITY STATEMENT



DEBIT CARD



BANK ACCOUNT STATEMENTS



ACCOUNT NUMBERS



PIN NUMBER



PERSONAL CONTACT



LOCATION OF RELEVANT DOCUMENTATION/ STATEMENTS



ONLINE ACCOUNT LOGIN INFO



FINANCIAL ACCOUNT STATEMENTS



BROKERAGE ACCOUNTS



RETIREMENT ACCOUNTS



ANNUITIES, LIFE INSURANCE



PHONE NUMBERS



AGENT OR FINANCIAL ADVISOR CARDS



MORTGAGE STATEMENTS, HELOC, TITLE



CAR TITLE, STATEMENTS



CREDIT CARD COPIES FRONT AND BACK



PASSPORT, TSA DOCUMENTS



WILL, TRUST, HEALTHCARE DIRECTIVES



HEALTH INSURANCE INFO, CAR INSURANCE, HOME INSURANCE INFO ETC.



EMPLOYER INFO, CONTACTS



RECORDS OF ALL YOUR ASSETS:



LIVING WILL AND HEALTHCARE PROXY



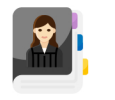
CONTACT DETAILS OF DOCTORS, WHERE TO FIND MEDICAL RECORDS



SAFE DEPOSIT STORAGE LOCKER. THINK "SECURE"



POWER OF ATTORNEY



CONTACT DETAILS FOR ATTORNEY'S



NAME OF THE BANK



BRANCH LOCATION



ACCOUNT NUMBER



BOX NUMBER



KEY LOCATION



AUTHORIZED USER CONTACT INFO



USERNAME/PASSWORDS OF YOUR ACCOUNTS



YOUR TRUSTED ADVISORS

- Financial advisor
- Accountant
- Attorney
- Business banker
- Personal banker
- Estate planning attorney

Scan and keep safe - encrypted hard drive, encrypted on cloud, keep a copy with a trusted person out of state of where you reside. Keep a copy with a licensed, trusted advisor.

Create a calendar to remind you to revisit your budget, credit report and other documents every year.



TRUSTED FAMILY/FRIENDS RESOURCES:

- List their names, phone, email, contacts.
- Letters and notes to your family
- Important addresses and phone numbers
- Account details for utilities
- Communicate your funeral wishes