

**CONTINGENCY INFORMATION FOR:**  
**NAME: \_\_\_\_\_**

Please utilize the information below in case of death or disability not allowing the above named person to manage her/his financial or legal matters. This is to be kept up to date and placed in a secure place known by the next of kin or POA (Power of Attorney). These important entry paths to banking, investment accounts and other company contracts may need to be contacted for updating or termination.

- 1. All important paper documents are kept;** (suggestion of a bank safety deposit box, and if used, please provide the specific name of the bank address, safety deposit number and location of the key to the box.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 2. Automobiles:**

- Title (s)Location \_\_\_\_\_
- VIN # \_\_\_\_\_ VIN # \_\_\_\_\_
- Licence plate: \_\_\_\_\_ License plate: \_\_\_\_\_
- Auto Insurance Company: \_\_\_\_\_ Phone # \_\_\_\_\_
- Policy # \_\_\_\_\_
- Loan information (if not owned outright) \_\_\_\_\_

- 3. Credit cards:**

- Card company: \_\_\_\_\_  
Name on Card: \_\_\_\_\_  
Account # \_\_\_\_\_ 3 digit # on Back: \_\_\_\_\_  
Expiration Date: \_\_\_\_\_ User Name: \_\_\_\_\_  
Pass word: \_\_\_\_\_  
Repeat this for all cards.

- 4. Cell Phone:**

- Phone number: \_\_\_\_\_ Cell phone company: \_\_\_\_\_  
Security Code to access phone: \_\_\_\_\_  
User name on Account and password: \_\_\_\_\_

- 5. Home Phone / Wifi:**

- Company: \_\_\_\_\_ Phone #: \_\_\_\_\_  
Username and password: \_\_\_\_\_  
Security Question/Answers: \_\_\_\_\_

**6. Home Television Companies / Streaming Services:**

Company: \_\_\_\_\_ Act #: \_\_\_\_\_  
User name / password; \_\_\_\_\_

**7. CPA / Tax Specialist:**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**8. Email Accounts:**

User name / password: \_\_\_\_\_

**9. Social Security #:** \_\_\_\_\_

**10. Investments:**

Company: \_\_\_\_\_ Phone: \_\_\_\_\_  
Account or user info: \_\_\_\_\_ Password: \_\_\_\_\_

**11. Insurance:**

Personal Life Insurance: Company, Account and Security Info:  
\_\_\_\_\_

Health Insurance: Company, Account and Security Info:  
\_\_\_\_\_

**12. Retirement Accounts:** \_\_\_\_\_

**13. Bank Accounts: All accounts with account numbers, user name & passwords:**

The next of kin or power of attorney should be a co-signature for account.

**14. Real Estate:**

- Location of deeds of ownership: \_\_\_\_\_
- Holder of mortgage: \_\_\_\_\_

**16. Will or Inheritance Information, such as Legal Trust:**

Location: \_\_\_\_\_

**17. Attorney / Legal Representative: Name and Contact information;**

\_\_\_\_\_

**18. Monthly subscriptions: magazine, APPS, music services, recurring purchases:**

\_\_\_\_\_

**19. Updated list of the Contents of the Safety Deposit Box and Home Safe with**

**combination (if in use).** \_\_\_\_\_

See below for suggestions of what to keep safe:

1. Will
2. Health Care Directive
3. Insurance Policies
4. Burial Instructions: Cremation - use MedCure or another company for medical research and then scatter some ashes on natural trail at Loeb park and rest do what you will....
5. List of special bequests
6. Property and casualty insurance policies
7. Loan agreements not yet satisfied
8. Real Estate Title and Deed:
9. Birth Certificates
10. Passports
11. Auto Titles;
12. Social Security Card
13. Precious metals
14. Computer thumb drive which contains a list of personal property or a video of your home environment including: art work, furniture, open view of closets, drawers, home safe, storage units and garage contents.