

# Personal Document and Account Organizer

The location of your personal documents and information regarding your accounts is important in the event of an emergency and will be of great assistance to your family, trustee and/or executor. Please share this information with them. This form is provided for your convenience in reviewing the locations of various important documents. Please keep this information in a safe place like a safety deposit box. If we can be of any assistance, please do not hesitate to call.

DOCUMENTS	LOCATIONS	DOCUMENTS	LOCATIONS
Birth certificate(s)	_____	Homeowners insurance policy	_____
Visa/Passport	_____	Mortgage papers	_____
Adoption papers	_____	Real estate titles/deeds	_____
Will(s)	_____	Rental property records	_____
Trust agreements	_____	Boat title(s)	_____
Family love letters	_____	Boat insurance	_____
Burial instructions	_____	Social Security card	_____
Power of attorney	_____	Military service records	_____
Guardianship documents	_____	Employment contracts	_____
Marriage certificate	_____	Retirement plan	_____
Safe combination, home	_____	Employee benefits plan	_____
Safe combination, business	_____	IRA documents	_____
Life insurance, group	_____	Brokerage account records	_____
Life insurance, personal	_____	Notes and other loan papers	_____
Other death benefits	_____	Divorce/separation records	_____
List of special bequests	_____	Contacts for relatives	_____
Auto insurance policy	_____	Cemetery lot titles(s)	_____
Auto title(s)	_____	Safe deposit box	_____
Auto registration(s)	_____	Safe deposit box key	_____
Health insurance policy	_____		

This information is general in nature and is not intended to be legal, tax, or financial advice. Although Regions believes this information to be accurate, it cannot ensure that it will remain up to date. Consult an appropriate professional concerning your specific situation and [irs.gov](https://www.irs.gov) for current tax rules. Regions, Regions Next Step, the Regions Next Step logo, and the Regions logo are registered trademarks of Regions Bank. The LifeGreen color is a trademark of Regions Bank.

# Personal Document and Account Organizer

## CREDIT CARDS

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## ACCOUNT NUMBERS

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## BANK ACCOUNTS

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## ACCOUNT NUMBERS

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## PROFESSIONAL RELATIONSHIPS

Investment Professional

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Insurance Agent

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Banker

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Attorney

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Executor/Trustee

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CPA/Accountant

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## CONTACT NUMBERS

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