



Your Personal Financial Inventory

Use this document to record your family's important financial information.
Store it in a safe place, and be sure to tell your executor or
family representative where to find it.

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Greenville, PA 16125
724-588-9067

www.OrsingerGroup.com
Info@OrsingerGroup.com

Assets-Bank Accounts
Checking, Savings, Money Market, Etc.

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Bank Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

**Assets-Investments/Retirement Accounts
401(k), IRA, Roth IRA, 403(b), TOD, Etc.**

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Company name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Other Pertinent Information

Assets-Education Accounts
529 College Plans, Coverdell College Plans

Company name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Company name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Company name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Company Name
Account Owner
Account Number
Contact Person
Phone Number
Beneficiary

Assets

Tangible Property: (Collectibles, Stock & Bond Certificates, Real Estate, Automobiles, Etc.)

Type of Asset

Location and other pertinent information:

Type of Asset

Location and other pertinent information:

Type of Asset

Location and other pertinent information:

Type of Asset

Location and other pertinent information:

Liabilities
Mortgages, Home Equity and Vehicle Loans

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Lender Name
Loan Number
Contact Person
Phone Number
Terms of Loan
Other Pertinent Information

Liabilities
Credit Card Companies

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Company Name
Account Owner
Account Number
Phone Number
Other Pertinent Information

Insurance

Life Insurance and Long-Term Care Insurance

Insurance Company
Policy Number
Policy Type
Death Benefit
Owner
Insured
Primary Beneficiary
Contingent Beneficiary
Contact Person
Phone Number

Insurance Company
Policy Number
Policy Type
Death Benefit
Owner
Insured
Primary Beneficiary
Contingent Beneficiary
Contact Person
Phone Number

Insurance Company
Policy Number
Policy Type
Death Benefit
Owner
Insured
Primary Beneficiary
Contingent Beneficiary
Contact Person
Phone Number

Insurance Company
Policy Number
Policy Type
Death Benefit
Owner
Insured
Primary Beneficiary
Contingent Beneficiary
Contact Person
Phone Number

Insurance
Auto and Home Insurance Policies

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Insurance Company
Policy Number
Contact Person
Phone Number
Insured Vehicle VIN/Make or Model

Estate Documents

Will, Living Will, Health Care Directive, Power of Attorney and Trust Agreements

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

Attorney Name
Address
Contact Person
Phone Number
Location of Document-Other Pertinent Information

**Location of
Misc. Important Documents**

Birth Certificate - Location

Cemetery/Burial Instructions - Location

Marriage/Divorce Certificate - Location

Birth Certificate - Location

Loan Documents - Location

Military Papers - Location

Passport - Location

Real Estate/Title & Deed - Location

Financial Records & Safe Deposit Box & Keys - Location

Social Security Records - Location

Tax Returns - Location

Will/Power of Attorney - Location

Auto, Home & Life Insurance - Location

Contacts
Contacts List

Accountant Name	
Street Address	
City, State, Zip	
Phone	E-mail

Attorney Name	
Street Address	
City, State, Zip	
Phone	E-mail

Employer Name	
Street Address	
City, State, Zip	
Phone	E-mail

Investment Manager Name	
Street Address	
City, State, Zip	
Phone	E-mail

Primary Physician Name	
Street Address	
City, State, Zip	
Phone	E-mail

Clergy/Priest Name	
Street Address	
City, State, Zip	
Phone	E-mail

Funeral Home	
Street Address	
City, State, Zip	
Phone	E-mail

Special Requests/Instructions