

JUDGE ELINORE MARSH STORMER

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Personal Records and Important Documents

Name: _____ Date: _____

Fill out this form and store it in a safe place along with other important documents. Tell your spouse or partner, adult child, trusted friend or relative where this information could be found in an emergency. If you need additional space, please attach the information on a separate sheet indicating the number and title of each section.

Social Security _____ Date of Birth _____

Contact regarding S.S. information and benefits: _____

1) Family (Spouse/Partner, Children, Close Relative or Trusted Friend - Include contact phone number, e-mail or address)

Name: _____ Relation: _____ Contact: _____

Name: _____ Relation: _____ Contact: _____

Name: _____ Relation: _____ Contact: _____

Name: _____ Relation: _____ Contact: _____

2) Doctor and Other Trusted Advisors (Name and contact phone number, e-mail or address)

Physician _____

Physician _____

Attorney: _____

Accountant _____

3) Last Will and Testament

Location: _____

4) Burial Policy/Funeral Plan/Declaration for Funeral Arrangements

Location: _____

Contact/Phone No.: _____

5) Cemetery Property

Ownership certificate location: _____

6) Birth Certificate

Location: _____

Name on Certificate: _____

Date of Birth: _____ City/County: _____ State: _____

Father's Name: _____

Mother's Name: _____

7) Marriage License

Location: _____

Wedding Date: _____ City/County: _____ State: _____

8) Divorce Records

Location: _____

Divorce Date: _____ City/County: _____ State: _____

Attorney's Name/Phone: _____

9) Military Records

Location: _____

Military ID No.: _____ Veterans Benefits/Info.: _____

Military Retirement Benefits

(Branch of Military Contact Phone No.): _____

10) Assets (Checking Accounts, Savings Accounts, CDs, etc.)

Bank/Institution	Account Number	Name on Account	Branch Location/Phone No.

11) Safe Deposit Box

Location: _____ Key Location: _____

Contents: _____

12) Retirement, 401(k) and/or IRA Documents

Contact/Phone No.: _____

Contact/Phone No.: _____

13) Investments-Stocks/Bonds and Brokerage Accounts

Location: _____

14) Insurance Policies

Location: _____

Name of Ins. Co.	Phone No.	Policy No.	Beneficiary	Value

15) Deed(s) to Real Estate and Mortgage Information

Location: _____

Mortgage Co. Name/Policy No.: _____

Contact/Phone No.: _____

16) Automobile and Other Vehicle Ownership (Auto, truck, motorcycle, motor home, boat, etc.)

Title(s) Location: _____

Vehicle ID No.	Year	Make	Model

17) Other Assets

Description: _____

Location of Important Documents: _____

18) Debts/Credit Cards

Location: _____

Credit Card Co.	Name on Account	Account No.	Contact Phone No.

19) Loans:

Type of Loan	Contact Phone No.	Documents Located

20) Tax Records

Location: _____

Accountant's Name/Phone No.: _____

21) Personal/Business Computers

Location.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

Location.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

22) Online/Electronic Banking Account

Name of Bank/Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

Name of Bank/Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

23) Online/Electronic Credit Cards

Name of Credit Card/Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

Name of Credit Card/Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

24) Miscellaneous Online/Digital Accounts and Websites (This includes E-mail, Facebook, Twitter, PayPal, eBay, iTunes, Flickr, cell phone accounts, photo galleries, blogging websites, etc.)

Name of Website and Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

Name of Website and Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

Name of Website and Web Address: _____

Account No.: _____ User Name: _____

Password: _____ Answer to Security Question: _____

25) Miscellaneous Valuables

Item: _____ Location: _____

Item: _____ Location: _____

Item: _____ Location: _____

26) Additional Notes



Judge Elinore Marsh Stormer
Summit County Probate Court, 209 S. High Street, Akron, OH 44308
330-643-2350 www.summitohioprobate.com