

Household Master List

List Organizer:

Date:

Bank & Deposit Accounts

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Other Info:

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Other Info:

Investments & Retirement Accounts

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Account Beneficiaries:

Other Info:

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Account Beneficiaries:

Other Info:

Household Master List

Credit-Loans, Credit Cards, Other Debt

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Other Info:

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Other Info:

Institution Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Names:

Account Numbers & Types:

Other Info:

Healthcare Providers

Clinic or Hospital Name:

Address:

Phone Numbers:

Email & Website Addresses:

Doctor & Other Contact Names:

Other Info:

Clinic or Hospital Name:

Address:

Phone Numbers:

Email & Website Addresses:

Doctor & Other Contact Names:

Other Info:

Household Master List

Healthcare Providers Continued

Dental Clinic Name:

Address:

Phone Numbers:

Email & Website Addresses:

Doctor & Other Contact Names:

Other Info:

Pharmacy Name:

Address:

Phone Numbers:

Email & Website Addresses:

Other Info:

Medications:

Health, Dental, Vision Insurance

Provider Name:

Address:

Phone Numbers:

Email & Website Addresses:

Group & Subscriber Numbers:

Healthcare Power of Attorney or Living Will on File? Y N

Other Info:

Provider Name:

Address:

Phone Numbers:

Email & Website Addresses:

Group & Subscriber Numbers:

Healthcare Power of Attorney or Living Will on File? Y N

Other Info:

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Life & Disability Insurance

Company Name:	
Address:	
Phone Numbers:	
Email & Website Addresses:	
Agent or Contact Name:	
Policy Number:	
Policy Amount:	
Policy Owner	
Policy Beneficiary	

Company Name:	
Address:	
Phone Numbers:	
Email & Website Addresses:	
Agent or Contact Name:	
Policy Number:	
Policy Amount:	
Policy Owner	
Policy Beneficiary	

Property, Auto, Liability Insurance

Company Name:	
Address:	
Phone Numbers:	
Email & Website Addresses:	
Agent or Contact Name:	
Policy Number:	
Other Info:	

Company Name:	
Address:	
Phone Numbers:	
Email & Website Addresses:	
Agent or Contact Name:	
Policy Number:	
Other Info:	

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Other Accounts- Flex Accounts, Health Savings, Education Savings, Other

Company Name:

Address:

Phone Numbers:

Email & Website Addresses:

Agent or Contact Name:

Policy Number:

Other Info:

Company Name:

Address:

Phone Numbers:

Email & Website Addresses:

Agent or Contact Name:

Policy Number:

Other Info:

Accountant, Attorney, Professional Advisors

Company Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Name:

Other Info:

Company Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Name:

Other Info:

Company Name:

Address:

Phone Numbers:

Email & Website Addresses:

Contact Name:

Other Info:

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E-Commerce / Online Accounts (please use caution when recording this info, as this could be lost or stolen.)

Website: _____
Account Number, Name, Type: _____
User or Log-in Name: _____
Password: _____
PIN: _____
Login Info: _____

Website: _____
Account Number, Name, Type: _____
User or Log-in Name: _____
Password: _____
PIN: _____
Login Info: _____

Website: _____
Account Number, Name, Type: _____
User or Log-in Name: _____
Password: _____
PIN: _____
Login Info: _____

Location of Important Documents

Will(s): _____
Power(s) of Attorney: _____
Healthcare Power of Attorney
and/or Living Will: _____
Real Estate Deed(s): _____
Vehicle Title(s): _____
Social Security Card(s): _____

Other important documents & information:

Attach additional pages as needed.