

Personal Inventory for Your Family



Use this document to record your family's important information. Be sure to keep it in a safe place and tell your executor or personal representative where to find it. Given the confidential information included within this document, please do not return this form to JNBA and instead keep this within your own records.

OFFICIAL DOCUMENTS



DOCUMENTS	LOCATION OF DOCUMENTS & CONTACT INFORMATION
Estate Planning Documents: Wills, Trust Agreements, Powers of Attorney, Health Care Directives	
Property Deeds/Titles: Real estate, vehicles, other	
Personal Documents: Birth certificates, adoption papers, marriage certificate, military documents, passport, divorce papers, prenuptial agreement, Social Security documents, tax returns	

FINANCIAL INFORMATION



FINANCIAL INFORMATION	INSTITUTION & CONTACT CREDENTIALS	WEBSITE & LOGIN	ADDITIONAL SIGNERS OR ACCOUNT OWNERS?
Banks & Credit Unions			
Credit Cards			
Mortgage			
Other Loan			
Investment Accounts			
Retirement Accounts			
Employee Benefits			
Annuities			
Education Accounts			
Other			
Other			
Other			
Other			
Other			

PLEASE NOTE: JNBA is not an accountant, an attorney, an insurance agent, nor an agent of the State Department of Human Services nor Social Security Administration, and no portion of the above should be construed as legal, accounting, or insurance advice. All legal, accounting, and insurance issues should be addressed with the legal, accounting, and insurance professionals of your choosing.

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PROFESSIONAL CONTACT INFORMATION



NAME OF PROFESSIONAL	PHONE & EMAIL
Financial Advisor	
CPA or Accountant	
Estate Attorney	
Primary Care Physician	

AUTO-PAY



Use this section to note what expenses are currently paid via auto-pay:

PAYMENT TO	DAY OF THE MONTH	WEBSITE & LOGIN/CREDENTIALS	AMOUNT

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INSURANCE INFORMATION



INSURANCE INFORMATION	LOCATION OF DOCUMENT & CONTACT INFORMATION	WEBSITE & LOGIN CREDENTIALS
Property & Casualty: Homeowners, Auto, Umbrella		
Personal Insurance: Health		
Personal Insurance: Life		
Personal Insurance: Disability		
Personal Insurance: Long-term care		
Funeral Policy: (if applicable)		
Annuity Policy: (if applicable)		

VALUABLES



ITEM	LOCATION & INSTRUCTIONS

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SUBSCRIPTIONS



MAGAZINE, NEWSPAPER, OR ONLINE SUBSCRIPTION	CONTACT & ONLINE CREDENTIALS

PETS



PET	IMPORTANT INFORMATION & INSTRUCTIONS (VET, ETC.)

END OF LIFE CARE & LEGACY



PERSONAL PREFERENCES	IMPORTANT INFORMATION & INSTRUCTIONS
Five Wishes (or other document)	
Burial/Cremation/Donation	
Funeral/Memorial Service	
Contracts/Prepaid Arrangements	
DNR/POLST Documents	

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SECURITY



SECURITY FEATURES	LOCATION & CREDENTIALS
Physical Safe or Locked Storage	
Home Security-Alarm, garage code, keyless entry codes, etc.	
Wi-Fi, Smart Home Devices	
Password Manager - Master Password	
House key (who has a copy?)	

NOTES & PERSONAL THOUGHTS



Use this section for any important information or personal thoughts you want to share with your family.

COMPUTER & PHONE INFORMATION



TYPE OF DEVICE (PHONE, LAPTOP, IPAD, ETC.)	LOCATION & CREDENTIALS (USERNAME/PASSWORD/PASSCODE)

ELECTRONIC ENTERTAINMENT



WEBSITE (HBO, HULU, NETFLIX, APPLE TV, ETC.)	(USERNAME/PASSWORD/PASSCODE)

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EMAIL INFORMATION



EMAIL ADDRESS	USERNAME & PASSWORD FOR EMAIL PLATFORM

SOCIAL NETWORKING & ELECTRONIC PROFILES



SOCIAL MEDIA SITE (FACEBOOK, INSTAGRAM, ETC.) OR BLOG/WEBPAGES (DOMAIN NAMES) YOU MANAGE	USERNAME & PASSWORD

DIGITAL LIBRARIES



MUSIC, PHOTO & EBOOK WEBSITES (ITUNES, BARNES & NOBLE, SHUTTERFLY, ETC.)	USERNAME & PASSWORD

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ONLINE PURCHASING PROFILES



WEBSITE (PAYPAL, EBAY, AMAZON, ETSY, ETC.)	USERNAME & PASSWORD

ADDITIONAL ITEMS



Use this section for any important information not captured earlier in the document.

