

# Master Financial Information Document

Use this list to create a snapshot of your family's financial information.  
Update it regularly and keep at least 2 copies in safe places.

- **Social Security Numbers for all family members**
- **Drivers License Numbers for all drivers**
- **Vehicle Identification Numbers for all vehicles**
- **Information about Your Will**
  - Lawyer's Name and Contact Information
  - Location of copies of Will
  - Date of Last Update for the Will
  - Executors on Will
  - Information about your funeral
- **Bank Information**
  - Account numbers
  - Who is listed on the account(s)
  - Contact numbers
  - Website Access Information
- **Medical Insurance**
  - Dental
    - Plan numbers
    - Who is listed on the account(s)
    - Contact numbers
    - Website Access Information
  - Regular
    - Plan ID
    - Who is listed on the account(s)
    - Contact numbers
    - Website Access Information
  - Additional Insurance
    - Account numbers
    - Who is listed on the account(s)
    - Contact numbers
    - Website Access Information

- **Insurance Information**
  - Policy numbers
  - Beneficiaries
  - Contact numbers
  - Website Access Information
  - Include information about workplace disability insurance
- **Mortgage/Home Equity Loan Information**
  - Company's name and contact information
  - Account Information
  - Website Access Information
- **Investment Information – Savings, Retirement, Mutual Funds**
  - Website Access Information
  - Contact numbers
  - Account numbers
- **Loans – Vehicle, Personal, College**
  - Company's Name and Contact Information
  - Account Information
  - Website Access Information
- **Credit Card Information**
  - Company's Name and Contact Information
  - Account Numbers
  - Website Access Information
- **Education Investments**
  - Company's Name and Contact Information
  - Account Information
  - Website Access Information
- **Utilities**
  - Company's Name and Contact Information
  - Account Information
  - Website Access Information