FINANCIAL INFORMATION

Basics

Name **Birth Date** **Social Security No**

BANKS – SAVINGS/CHECKING

Name **Type** **Account No** **Phone No**

AUTOMATIC DEPOSITS

Type **Account** **Day of Deposit** **Amount**

AUTOMATIC WITHDRAWALS

Type **Account** **Day of Withdrawal** **Amount**

Financial Advisor/Broker

Name **Account Number** **Phone No**

Miscellaneous: Contact Social Security to stop check and claim small death benefit. Contact Pension Company to stop check. Get 8-10 certified copies of death certificate as that is needed to handle several different things.

HOUSEHOLD INFORMATION

UTILITIES

Name	Account Number	Phone Number

CREDIT/DEBIT CARDS

Name	Account Number	Phone Number

INSURANCES Life/Health/Long Term/ Home/Cars

Name/Policy Number	Contact Person	Phone Number

Mortgage

Lender	Account Number	Phone Number

FURNITURE(antiques)/JEWELRY

Description of item and approximate value

ATTORNEY

Name	Phone Number

CHURCH

Name	Contact Person	Phone Number