Family Financial Organizer Table of Contents

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Financial Statement

Bank Accounts

Type of Acct: Name on Acct: Acct Number: Name of Bank: Bank Address: Signatories:

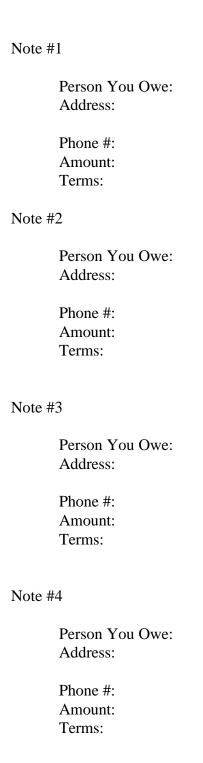
Type of Acct: Name on Acct: Acct Number: Name of Bank: Bank Address: Signatories:

Type of Acct: Name on Acct: Acct Number: Name of Bank: Bank Address: Signatories:

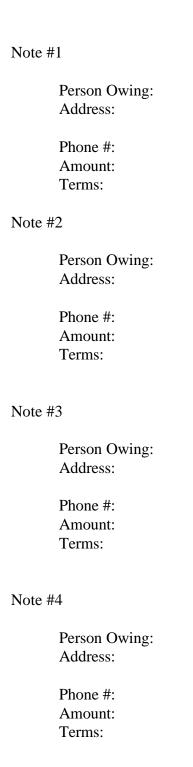
Type of Acct: Name on Acct: Acct Number: Name of Bank: Bank Address: Signatories:

Type of Acct: Name on Acct: Acct Number: Name of Bank: Bank Address: Signatories:

Notes Payable



Notes Receivable



Real Estate

Residence:	
Home Address:	
Assessed Valuation: Mortgage Held By: Amount Owed:	
Residence:	
Home Address:	
Assessed Valuation: Mortgage Held By: Amount Owed:	

Income Properties

Commercial Property:	
	Address:
	Lessee: Terms: Current Value: Amt. Owed: Realtor/Mgr.:
Addres	ss:
	Lessee: Terms: Current Value: Amt. Owed: Realtor/Mgr.:
Other Properties:	
	Location:
	Purchase Price/Value: Amt. Owed:
	Location:
	Purchase Price/Value: Amt. Owed:
	Location:
	Purchase Price/Value: Amt. Owed:

Homeowners Insurance

Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	

Income Property Insurance

Insurance Company: Policy #: Insurance Agent:	
Address: Phone #:	
Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	
Insurance Company: Policy #: Insurance Agent: Address:	
Phone #: Coverage:	

Umbrella Liability Coverage

Life Insurance

Policy #: Insurance Agent: Address:
Phone #: Face Value: Type of Insurance:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Face Value: Type of Insurance:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Face Value: Type of Insurance:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Face Value: Type of Insurance:

Insurance Company:

Medical Insurance

Insurance Company:
Policy #:
Group #: Insurance Agent:
Address:
Phone #:
Insurance Company:
Policy #:
Group #:
Insurance Agent:
Address:
Phone #:

Auto Insurance

Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Coverage:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Coverage:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Coverage:

Vehicles

Make: Model: Year: Purchase Price: Registration Renewal: Title in possession of:
Make: Model: Year: Purchase Price: Registration Renewal: Title in possession of:
Make: Model: Year: Purchase Price: Registration Renewal: Title in possession of:
Make: Model: Year: Purchase Price: Registration Renewal: Title in possession of:
Make: Model: Year: Purchase Price: Registration Renewal: Title in possession of:

Investments

Annuities

Policy #: Insurance Agent: Address:
Phone #: Face Value:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Face Value:
Insurance Company: Policy #: Insurance Agent: Address:
Phone #: Face Value:

Certificate Of Deposit (CD'S)

Type of Account:
Name/s on Acct:
Acct Number:
Bank Address:
Signatories:
Type of Account:
Name/s on Acct:
Acct Number:
Bank Address:
Dank Madress.
Signatories:
Type of Account:
Name/s on Acct:
Acct Number:
Bank Address:
Signatories:

Birth Certificates & Passports

Funeral Preferences

Mortuary:
Name of Cemetery:
Plot Number:
Address:
Special restrictions:
Music: 1. 2. 3.
Type of Casket:
Pall Bearers:
Headstone:
Flowers:
Special Instructions:

Trust Agreement

by
and
as
Trustors
and
as
presently acting
Trustees
Creating a Revocable Trust
known as
Dated: