Your Personal Information

An organizer that can be used for planning or emergencies

Personal Profile

Name	Social Security #	Birth Date	Location of Birth Certificate
Client 1			
Client 2			
Children			
Other Beneficiaries			

Do you have:

	Current and dated	Location
☐ Will	___/___/_____	
☐ Durable power of attorney	___/___/_____	
☐ Health care directive	___/___/_____	
☐ Living will	___/___/_____	
☐ Revocable living trust	___/___/_____	
☐ Other trusts	___/___/_____	

Personal representative/executor ____

Successor trustee ____

Location of tax returns ____

Location of safety deposit box (institution) ________________________ Address ______________________

Names of those authorized to open safe deposit box ____

Location of keys ____

Contents (stock certificates, EE bonds, bearer bonds, etc.) ____

Location of appraisal and inventory of personal property (including collectibles) ☐ List ☐ Photos ☐ Video

____

Location of real estate deeds ____

Location of divorce decree/prenuptial agreement/child's support documentation ______________________________

Investment / bank accounts

Bank / institution	**Bank / institution**	
How account is titled	How account is titled	
Account number	Account number	
Type of account	Type of account	
Account number	Account number	
Type of account	Type of account	

Trust Accounts

Institution ____

Address ____

Type of Trust ____ Tax ID number ______________________

Current trustee _______________________________________ Successor trustee ____________________

Beneficiaries ____

Institution ____

Address ____

Type of Trust ____ Tax ID number ______________________

Current trustee _______________________________________ Successor trustee ____________________

Beneficiaries ____

Securities

Brokerage firm	**Brokerage firm**
How account is titled	How account is titled
Account number	Account number
Type of account	Type of account
Account number	Account number
Type of account	Type of account

IRAs / retirement plans

Type: ☐ Traditional IRA ☐ Roth IRA ☐ Qualified plan ☐ 403 b

Participant ____

Names of company (i.e. brokerage firm, bank, mutual fund) ____

Address ____

Account number _________________ Approximate value $_______________________ Date ________________

Primary beneficiaries ____

Contingent beneficiaries ____

Type: ☐ Traditional IRA ☐ Roth IRA ☐ Qualified plan ☐ 403 b

Names of company (i.e. brokerage firm, bank, mutual fund) ____

Address ____

Account number _________________ Approximate value $_______________________ Date ________________

Primary beneficiaries ____

Contingent beneficiaries ____

Life insurance policies

Owned by	Type of Policy	Issuer	Insured	Beneficiary	$Death Benefit	Premium	Cash Value	Loans
					$	$	$	$
					$	$	$	$
					$	$	$	$
					$	$	$	$
					$	$	$	$

WL= Whole life; G=Group term; UL=Universal life; SPWL=Single premium whole life; T=Term; SL=Survivorship life
* The owner is assumed to be the insured unless you note otherwise.

Have these policies been reviewed recently? ☐ Yes ☐ No

Do these policies meet your current needs? ☐ Yes ☐ No

Location of policies ____

Annuities

Owned by	Type of contract	Issuer	Beneficiary	Death benefit	Cash value
			$	$	$
			$	$	$
			$	$	$

F= Fixed rate; V=Variable rate

Real estate / real-estate interests owned / other ____

Location of property ____

Location of any stored assets ____

Lender ____ Lenders Address _________________________________

Account number ________________________________ Loan Amount $________________________________

Payment amount $_______________________________ Date due _____________________________________

Interest rate ___________________________________% Maturity _____________________________________

Real estate / real-estate interests owned / other ____

Location of property ____

Location of any stored assets ____

Lender _______________________________________ Lenders Address _______________________________

Account number ________________________________ Loan Amount $________________________________

Payment amount $_______________________________ Date due _____________________________________

Interest rate ___________________________________% Maturity _____________________________________

Online accounts

It could be very important for your executor, trustee, attorney-in-fact, or a trusted family member to gain access to information from your computer, phone or online accounts.

If you keep a separate list / record of passwords, location of list: ____

Note: Consider keeping a copy of this organizer with your estate planning documents.

Wells Fargo Advisors is not a legal or tax advisor.

Investment and Insurance Products: ▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value