



**Contact Planner/Organizer**

# Contact Planner/Organizer

Use this Organizer Form to keep track of important names, numbers, locations, and notes for the important accounts in your life. This list might come in handy in case of emergency, should a 3rd party need this information. It may also be helpful to use as a "Road Map" in planning for some of the tools and planning items you may encounter in life.

*\*Hint: It might be helpful to password protect this document if you are using it to track your sensitive account information*

Key Contacts	Name	Address	Phone	Email
Emergency Contact(s)				
CPA/Accountant				
Insurance Rep				
Financial Advisor				
Attorney				
Doctor				

General & Financial Information Papers	Location/Company	Username	Password/Code
<b>General Information for Monthly Expenses</b>			
Computer Password (If Any)			
E-mail Address(es)			
Bank Account/Online Profile			
Phone Bill			
Gas Bill			
Electricity Bill			
Cable/Internet Bill			
<b>General Items/Documents Readily Accessible</b>			
Social Security Card			
Birth Certificate			
Passport/Citizenship (naturalization) Papers			
Driver's License Number and Expiration Date			
Garage Door Opener			
Safe and Combination			
Safe Deposit Box(es) and Keys			
Adoption Papers			
Marriage Certificate			
Prenuptial Agreement			
Divorce or Separation Papers			
<b>Personal Financial Documents (Needed for tax reporting, to settle debts, for transfer or ownership and last will/testament)</b>			
Tax Forms for Tax Return Prep (W-2s, 1099s, etc.)			
Mortgage Documents			
Real Estate Deeds, Other Titles of Ownership			
Motor Vehicle Title Papers			
Property and School Tax Records			
Medical Bills, Prescription Plan Card/Records			
Other Tax info, Documentation (Charity Receipts, Business Records, Expense receipts)			
Prior Year's Tax Returns			
Federal/State/Gift Tax Returns			
Rental and/or Lease Agreements			
Appraisal or Inventory of Valuable Items			
Buy/Sell or Partnership Agreement Documents			
Deferred Compensation Agreement Documents			
Promissory Notes (Debts Owed)			
Loans Outstanding (Money Owed)			
Trust Documents/Agreements			
<b>Insurance/Annuity Documents (Needed for tax reporting and to settle claims)</b>			
Variable or Fixed Annuity Statements/Documents			





**Weber & Deegan, Ltd.**

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