Methods for Compiling, Organizing and Documenting Personal and Financial Information

Keep your information accessible, while also keeping it safe from theft, fire or for other emergencies.

Make your information is clear and understandable for those who will need to use it.

Ensure your trusted loved one knows how to and has the ability to access your information (passwords, location to keys, name on the lock box at the bank)

Tell only trust loved ones, who will be handling these details, where your information can be found.

There may be a few different places you store information or documents. Just remember to document where those places are located.

Make it easy to maintain. You will review at least once a year (or any major changes) to make sure everything is updated.

Create an Excel or Word Document

- Outline all of your personal and financial information.
- Include: Account Information, Expiration Dates, Phone Numbers, Websites, Usernames/Passwords, Beneficiary Details and Special Notes.

Put in a Box

- Place all of your details into a box with notes.

Put in a Binder

- Create a binder with sections for your information and documents.

Workbooks and Books You Can Buy and Fill Out

Handwrite Out Details

Online Services

- Websites for organizing estate planning documents:
  - https://www.kiplinger.com/article/retirement/T021-C000-S004-all-documents-in-one-place-online.html
  - Make sure you are organizing your personal and financial information as well as estate planning documents.