

The Big Book of Everything

Version III



Compiled by Erik A. Dewey

The Big Book of Everything - Information Organizer Mk III

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The Big Book of Everything

Welcome and get ready to document your life.

The idea behind this book is to have a single place where you or a loved one can find any piece of information about you. The majority of the information tracked in this book is financial in nature and the ultimate use is for when you pass on. Contained in this book is hopefully everything your loved ones need to know about you during a trying time.

Wills and trusts are very important, and realize this book does not replace them, but what about things that aren't covered by them. What is the password to the deceased's email account? What is the account number and contact information for the cable company? Where is last year's tax return stored? These kinds of questions can be answered by this book.

However, it is not just to be used when dealing with the loss of a loved one. It also contains information that is called upon occasionally but hard to remember. Things like the addresses of all of your residences, the VIN number on your car, the address of that place you worked at one summer.

Now there are a lot of things to fill out here and a lot of information to gather. Don't panic and don't feel overwhelmed. Nobody says you have to get this done in a day, or a week even. Just take your time and fill out the forms as you have time. You should be able to fill out about one form a day and have the entire book finished in a month. If you need more than one page to track something, simply print out another sheet.

Each year, go through the book and make any changes that you need to. Print off additional sheets if the current ones are full or the changes are that significant. It is important to keep the book as up to date as possible as you never know when you will need some of that information.

Finally, it should be obvious, but make certain others know about this book and where you keep it. Also since it contains a lot of confidential information, be sure to safeguard its location in some manner.

If you come across any problems or think of things that should be included, please let me know and I'll update the file.

Thanks.

Erik A. Dewey
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www.erikdewey.com

Personal Information (you, spouse, children, parents)

Name		Current address			
Home phone	Work phone	Cell phone	All email addresses		
Office address			Office contact name and phone		
Birthdate	Birthplace	Anniversary	SSN	DL #	DL State
Name		Current address			
Home phone	Work phone	Cell phone	All email addresses		
Office address			Office contact name and phone		
Birthdate	Birthplace	Anniversary	SSN	DL #	DL State
Name		Current address			
Home phone	Work phone	Cell phone	All email addresses		
Office address			Office contact name and phone		
Birthdate	Birthplace	Anniversary	SSN	DL #	DL State
Name		Current address			
Home phone	Work phone	Cell phone	All email addresses		
Office address			Office contact name and phone		
Birthdate	Birthplace	Anniversary	SSN	DL #	DL State
Notes					

Adoption Information

Child's name before adoption		Child's name after adoption	
Birth mother name	Birth mother DOB	Birth father name	Birth father DOB
Birth institution name	Birth institution address		
Location of original birth certificate	Completed reunion registry		
Adoption agency name	Adoption agency contact info		
Child's name before adoption		Child's name after adoption	
Birth mother name	Birth mother DOB	Birth father name	Birth father DOB
Birth institution name	Birth institution address		
Location of original birth certificate	Completed reunion registry		
Adoption agency name	Adoption agency contact info		
Child's name before adoption		Child's name after adoption	
Birth mother name	Birth mother DOB	Birth father name	Birth father DOB
Birth institution name	Birth institution address		
Location of original birth certificate	Completed reunion registry		
Adoption agency name	Adoption agency contact info		
Notes			

Location of Important Documents and Contacts

Who	Birth Certificate Location	Who	Birth Certificate Location
Who	Birth Certificate Location	Who	Birth Certificate Location
Who	Marriage License Location	Who	Marriage License Location
Who	Divorce Decree Location	Who	Divorce Decree Location
Who	Other Document Type Location	Who	Other Document Type Location
Who	Other Document Type Location	Who	Other Document Type Location
Who	Other Document Type Location	Who	Other Document Type Location
Who	Other Document Type Location	Who	Other Document Type Location
Who	Attorney Name	Phone	
Attorney Address		Attorney Specialty	
Who	Attorney Name	Phone	
Attorney Address		Attorney Specialty	
Who	Attorney Name	Phone	
Attorney Address		Attorney Specialty	
Who	Accountant Name	Phone	
Accountant Address		Accountant Specialty	
Notes			

Travel Information (Passports, loyalty programs, etc.)

Name on Passport		Passport number	Storage Location	Issuing Country	Expiration Date
Name on Passport		Passport number	Storage Location	Issuing Country	Expiration Date
Name on Passport		Passport number	Storage Location	Issuing Country	Expiration Date
Name on Passport		Passport number	Storage Location	Issuing Country	Expiration Date
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Loyalty Program	ID Number	Level	Website	Notes	
Parking Permit Type	ID Number	Vehicle Associated	Contact Name		Contact Phone
Parking Permit Type	ID Number	Vehicle Associated	Contact Name		Contact Phone
Parking Permit Type	ID Number	Vehicle Associated	Contact Name		Contact Phone
Global Entry ID /Who Number		Global Entry ID /Who Number			

Current Resume

Keep a copy of your current resume in a pouch or page protector on this page.

Emergency Plan

Meeting location 1

Meeting location 2

Emergency grab list

Water shutdown location

Gas shutdown location

Fire extinguisher

Smoke detectors

Burgular alarm Code

Alarm company contact

Emergency water location

Emergency food location

Emergency cash location

Emergency contact name

Relationship

Phone number(s)

Address

Emergency contact name

Relationship

Phone number(s)

Address

Emergency contact name

Relationship

Phone number(s)

Address

Other emergency notes

Data Backup Plans (services, thumb drives, external hard drives, DVDs, etc.)

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
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How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Type	Description	ID/Login (if needed)	Password	Location
------	-------------	----------------------	----------	----------

How to restore

Groups and Organizations (clubs, professional organizations, civic groups, etc.)

Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number
Group name		Contact name		Contact phone/email
Membership level	Who	Awards received	Member since	Membership number

Notes

Bank Accounts

Type	Institution	Account number	
Owners of account		Institution contact info	
Statements sent to (physical address or email address)		Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account		ATM PIN
Type	Institution	Account number	
Owners of account		Institution contact info	
Statements sent to (physical address or email address)		Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account		ATM PIN
Type	Institution	Account number	
Owners of account		Institution contact info	
Statements sent to (physical address or email address)		Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account		ATM PIN
Type	Institution	Account number	
Owners of account		Institution contact info	
Statements sent to (physical address or email address)		Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account		ATM PIN
Notes			

Account Numbers (Utilities, Mortgage, Cable, Lawn, Cell Phone, Cleaning, etc.)

Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
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Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website
Account type	Account number	Who	Company	Phone	Website

Previous Addresses

Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Street			City
State	Zip	Dates lived there	Who
Notes			

Employment (Current and Previous)

Who employed?	Company name		Street		
City	State	Zip	Phone	Supervisor	
Position held	Dates employed		Starting pay	Ending pay	Reason for leaving
Who employed?	Company name		Street		
City	State	Zip	Phone	Supervisor	
Position held	Dates employed		Starting pay	Ending pay	Reason for leaving
Who employed?	Company name		Street		
City	State	Zip	Phone	Supervisor	
Position held	Dates employed		Starting pay	Ending pay	Reason for leaving
Who employed?	Company name		Street		
City	State	Zip	Phone	Supervisor	
Position held	Dates employed		Starting pay	Ending pay	Reason for leaving
Who employed?	Company name		Street		
City	State	Zip	Phone	Supervisor	
Position held	Dates employed		Starting pay	Ending pay	Reason for leaving
Notes					

Schooling History

Grades Attended	School Name	Street			
City	State	Zip	Phone	Who	
Dates attended	Degree earned	GPA	Major	Minor	
Grades Attended	School Name	Street			
City	State	Zip	Phone	Who	
Dates attended	Degree earned	GPA	Major	Minor	
Grades Attended	School Name	Street			
City	State	Zip	Phone	Who	
Dates attended	Degree earned	GPA	Major	Minor	
Grades Attended	School Name	Street			
City	State	Zip	Phone	Who	
Dates attended	Degree earned	GPA	Major	Minor	
Notes					

Transcripts

Keep a copy of all your college transcripts in a pouch or page protector on this page.

Military History

Payroll Name		Branch	SSAN	DOB	Place of Birth
Date Entered	Date Released	Officer/Enlisted	Final Rank		
Medical Issues					
Payroll Name		Branch	SSAN	DOB	Place of Birth
Date Entered	Date Released	Officer/Enlisted	Final Rank		
Medical Issues					
Payroll Name		Branch	SSAN	DOB	Place of Birth
Date Entered	Date Released	Officer/Enlisted	Final Rank		
Medical Issues					
Payroll Name		Branch	SSAN	DOB	Place of Birth
Date Entered	Date Released	Officer/Enlisted	Final Rank		
Medical Issues					
Notes					

Life Insurance Policies (includes AD&D and LTD)

Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Notes			

Health Insurance Policies (includes Dental and Prescription Drugs)

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network
Notes				

Car Insurance

Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage			Deductibles	\$ deductions
Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage			Deductibles	\$ deductions
Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage			Deductibles	\$ deductions
Notes				

Homeowner/Renters Insurance

Insurer	Location insured	Policy number
Contact information	Deductible	
Items explicitly covered		
Policy notes		
Insurer	Location insured	Policy number
Contact information	Deductible	
Items explicitly covered		
Policy notes		

Medical History (Yourself and Immediate Family), Including Allergies

Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results
Who	Approx date	Condition/illness	Notes/results

Notes

Long Term Health Care Directions (Self and Immediate Family)

Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired
Who	Situation	Care desired

Notes

Organs, Tissue, and Body Donation (Self and Immediate Family)

Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate

Notes

Pet information

Name					Animal Type		Breed		Color		Sex
Adopt/Birth Date		License Number		AKC Number		Other ID numbers or unique features					
Vet Name		Vet Phone		Vet Address					Spay/Neuter?		
Pet Insurance Name		Pet Insurance Phone		Pet Insurance ID Num		Pet Insurance Address					
Special needs											
Food info											
Medication Name				Frequency		Medication Name				Frequency	
Medication Name				Frequency		Medication Name				Frequency	
Name					Animal Type		Breed		Color		Sex
Adopt/Birth Date		License Number		AKC Number		Other ID numbers or unique features					
Vet Name		Vet Phone		Vet Address					Spay/Neuter?		
Pet Insurance Name		Pet Insurance Phone		Pet Insurance ID Num		Pet Insurance Address					
Special needs											
Food info											
Medication Name				Frequency		Medication Name				Frequency	
Medication Name				Frequency		Medication Name				Frequency	
Notes											

Guardianship of Children

Child Name	Guardian Name
Guardian Phone	Guardian Address

Notes for Guardian

Child Name	Guardian Name
Guardian Phone	Guardian Address

Notes for Guardian

Child Name	Guardian Name
Guardian Phone	Guardian Address

Notes for Guardian

Notes

Final Arrangements

Who	Date updated	Time on life support?	DNR?	Institution to handle arrangements	
Casket/container type		Open/closed?	Embalmed?	Burial/cremation?	Where interred?
Who performs ceremony?		Pallbearers?			
Grave/Memorial marker details		Ceremony speakers		Special music, notes, food, or drink?	
Where flowers/donations should be sent				Location of will	
Other notes about final arrangements					
Who	Date updated	Time on life support?	DNR?	Institution to handle arrangements	
Casket/container type		Open/closed?	Embalmed?	Burial/cremation?	Where interred?
Who performs ceremony?		Pallbearers?			
Grave/Memorial marker details		Ceremony speakers		Special music, notes, food, or drink?	
Where flowers/donations should be sent				Location of will	
Other notes about final arrangements					
Prepaid funeral information					

Eulogy Notes (milestones of your life to help with any eulogy)

Who

Notes

Who

Notes

Notes

Estate Plans and Gifts

Who	Will location	Executor of will	Trust location	Trustees	
Who	Will location	Executor of will	Trust location	Trustees	
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Item				Who should receive this?	
What circumstances (death of self, spouse, or both)				Estimated Value	Date
Notes					

Other Contacts in Case of Death

Company benefits department			
Company	HR phone number	Employee number	Notes

Insurance company				
Company	Contact number	Policy number	Agent name	Notes

Insurance company				
Company	Contact number	Policy number	Agent name	Notes

Insurance company				
Company	Contact number	Policy number	Agent name	Notes

Insurance company				
Company	Contact number	Policy number	Agent name	Notes

Social Security Administration		
SSN	Contact number	Notes
	800-772-1213	

Veterans Administration		
ID number	Contact number	Notes
	800-827-1000	

Pension Plan			
Company	Contact number	Account number	Notes

Pension Plan			
Company	Contact number	Account number	Notes

Pension Plan			
Company	Contact number	Account number	Notes

Credit Bureaus (verify addresses) (send copies of death certificates)			
Equifax	Experian	TransUnion	
PO Box 105139	P.O. Box 4500	P.O. Box 2000	
Atlanta, GA 30348	Allen, TX 75013	Chester, PA 19022	

Notes

Funeral Related Expenses and Receipts

Keep all funeral related expenses and receipts in a pouch or page protector on this page.

Investments (including mutual funds, annuities, and stocks)

Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Type	Name	Account number		
Contact info	Location of information		Value	Date
Notes				

Other Assets (Savings bonds, stock options, etc.)

Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Type	Name	Account number		
Contact info		Location	Value	Date
Notes				

Retirement Plans (401k, pensions, IRAs, etc.)

Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Type	Name	Account number		
Contact info		Location of information	Value	Date
Notes				

Private Business

Type	Name of company	Position in company	SSN/FEIN		
Partner name	Partner contact info				
Partner name	Partner contact info				
Location of business/tax forms		Location of inventory			
Name of bank	Bank account number	Credit card number (s)			
PIN	Bank url	Bank website ID	Bank website password		
Domain name reg	Account ID	Password	Webhost	Account ID	Password
Email url	Email address	PW	Other website	ID	Password
Other website	ID	PW	Other website	ID	Password
Other website	ID	PW	Other website	ID	Password

Notes

Real Estate

Location		Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info		
Property taxes	Location of paperwork			
Notes				
Location		Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info		
Property taxes	Location of paperwork			
Notes				
Location		Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info		
Property taxes	Location of paperwork			
Notes				
Notes				

Safes, Storage Units, PO Boxes, Safety Deposit Boxes, etc.

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Type	Location	Combination	Key location
------	----------	-------------	--------------

What is stored within?	Date Closed
------------------------	-------------

Other Key	What lock	Where kept	Other Key	What lock	Where kept
-----------	-----------	------------	-----------	-----------	------------

Other Key	What lock	Where kept	Other Key	What lock	Where kept
-----------	-----------	------------	-----------	-----------	------------

Notes

Valuables Inventory (go room by room and look for things of value)

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value
Notes				

Automobiles, Motorcycles, Boats, RVs, and other vehicles

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer		Policy number	Odometer/hours
Notes					Date
Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer		Policy number	Odometer/hours
Notes					Date
Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer		Policy number	Odometer/hours
Notes					Date
Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer		Policy number	Odometer/hours
Notes					Date
Notes					

Tax Issues and Records

Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Tax Year	Location of forms		Name of CPA	CPA contact information	
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref
Notes					

Property Tax Records

Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Tax Year	Location of forms	Name of CPA	CPA contact information	
Address		Taxable Value	Tax Owed	Homestead Exempt?
Notes				

Loan Obligations

Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Type	Lending institution		Contact info		Paid off and date?
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date
Notes					

Credit Report

Keep a current copy of your credit report(s) in a pouch or page protector on this page.

Credit Cards

Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password		Outside US customer service phone num	
Interest rate	Balance	Credit limit	Date	Closed?	Date closed
Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password		Outside US customer service phone num	
Interest rate	Balance	Credit limit	Date	Closed?	Date closed
Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password		Outside US customer service phone num	
Interest rate	Balance	Credit limit	Date	Closed?	Date closed
Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password		Outside US customer service phone num	
Interest rate	Balance	Credit limit	Date	Closed?	Date closed
Notes					

Other Debts

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Notes

Debts and Obligations Owed to You

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?

Notes

Notes