



Resolve to get your
affairs in order this year

VITAL RECORDS WORKSHEET

Our lives, in many ways, can be recounted through aspects of our personal records and other important legal documents. They often tell a story as we transition through life – whether it's a new job, marriage, birth of a child, first home, or a death in the family. And they provide direction to your loved ones in the event of the unexpected.

Yet, when the time comes, can these critical papers be easily found? It's important to know exactly where they're located in order to protect you and your family. With a little preparation and planning, this information can be readily available at your fingertips.

We created this ***Vital Records Worksheet*** to serve as a handy guide for updating and organizing your important information and documents. We hope you find it to be a useful tool. If you need assistance, please contact a qualified professional at Brogan Financial. We are always here to support you.

Warm Regards, 



IMPORTANT CONTACTS	NAME	PHONE NUMBER
Financial Professional		
CPA/Accountant		
Insurance Agent		
Attorney		
Executor of Estate		

EMERGENCY PAPERS AND/OR INFORMATION LOCATION

✓ General Items	
Birth Certificate	
Social Security Card	
Passport/Citizenship (naturalization papers)	
Driver's License number and expiration date	
Adoption papers	
Marriage certificate	
Pre-nuptial agreement	
Divorce or separation papers	
Safe deposit box(es) and keys	
Safe and combination	

✓ Investment Documents	
Brokerage account statements	
Mutual fund account statements	
Annuity account statements	
Individual retirement plan statements	
Company retirement plan statements	
Other company benefits (e.g. deferred compensation)	
Stock certificates not held in an account	
Bearer bonds not held in an account	
Alternative investment documents (including K-1s)	
Investment club documents/records	
529 college savings plan statements	
On-line securities access information	
Beneficiary forms for IRAs, 401 (k)s, or other benefits plans	
Documents showing cost basis of securities owned or sold	

EMERGENCY PAPERS AND/OR INFORMATION**LOCATION****✓ Insurance Documents**

Life insurance policy documents	
Group life policies	
Health and accident insurance ID cards and claim records	
Emergency papers or information	
Property and casualty policy documents	
Veterans Administration insurance papers	
Beneficiary forms for insurance or annuity policies	
Long-Term Care insurance policy	

✓ Personal Financial Documents

Appraisals for valuable items	
Inventory of valuable items	
Buy/sell or partnership agreements	
Deferred compensation agreements	
Federal/state returns	
Prior years' tax returns	
Motor vehicle title and/or registration papers	
Lawsuit or documents on pending legal actions	
Promissory notes	
Outstanding loans	
Mortgage documents	
Medical bills/records, prescription plan card	
Property and school tax records	
Real estate deeds and/or other titles of ownership	
Rental and/or lease agreements	
Trust documents/agreements	

✓ Bank/Credit Documents

Checking or Money Market account statements	
Checks	
Savings accounts	
Credit cards and account statements	
Credit union account books or statements	

EMERGENCY PAPERS AND/OR INFORMATION**LOCATION**

✓ Emergency Documents	
Living Will/Healthcare Proxy	
Durable Power of Attorney	
Financial institution's proprietary Power of Attorney forms <i>Some financial institutions may refuse to accept a standard Power of Attorney.</i>	
Paperwork for final arrangements	
Last Will and Testament <i>Wills should not be kept in a safe deposit box. Rather, wills should be stored in either a lawyer's will safe or a fireproof safe at your home.</i>	
Military discharge papers <i>Veterans receive a small stipend toward burial expenses.</i>	
Burial instructions	
Cemetery plot deed	
Burial instructions	
Pre-paid cremation documents	
Funeral home preference and information	
Charitable donations preference(s)	
Letter of instruction (if available) from the deceased to executor <i>The number of accounts or titles of ownership of the deceased.</i>	
Death Certificate	
Phone number/address of County Surrogate Court <i>The county court or clerk's office where the decedent resided will handle/oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i>	
Information for obituaries (resume/life story/biography, etc.)	

For assistance or additional information, please call our office at 865-862-6800 or visit www.broganfinancial.com.

DIGITAL ASSETS

Today, you can access almost anything through the internet. The internet is a convenient way to handle communication, business activities, and social interactions. You can also access just about anything you want including your personal finances, photo memories, music, shopping, and loyalty programs from the convenience of your smart phone. As we are able to access more and more online, we accumulate a larger digital footprint. Keeping a comprehensive list of all of your digital accounts will not only help you remember all of your accounts, but also give your heirs a list of places to make sure your accounts are closed or secured when you pass.

Emergency Documents:

- ☐ Gmail/Yahoo/etc.
- ☐ Work email

Online Payment Platforms:

- ☐ PayPal
- ☐ Venmo
- ☐ Zelle
- ☐ CashApp
- ☐ Physicians' office/pharmacy

Social Media:

- ☐ Facebook
- ☐ LinkedIn
- ☐ Instagram
- ☐ X (Twitter)
- ☐ WhatsApp
- ☐ SnapChat

Virtual Currency:

- ☐ Bitcoin
- ☐ Ethereum
- ☐ Zcash
- ☐ Dash

Storage and File Sharing:

- ☐ Dropbox
- ☐ iCloud
- ☐ Google Drive
- ☐ OneDrive

Rewards:

- ☐ Travel rewards (hotel, airline, car rental)
- ☐ Credit card points
- ☐ Retailer loyalty programs (grocery stores, Walgreens)

Shopping/Delivery Services:

- ☐ Amazon
- ☐ Target
- ☐ Walmart
- ☐ Instacart
- ☐ Etsy
- ☐ eBay

Online Business Services:

- ☐ Website hosting services (GoDaddy, Wix, Hubspot)
- ☐ LinkedIn

Video Services:

- ☐ Cable
- ☐ Netflix
- ☐ AppleTV
- ☐ YouTube, Hulu, SlingTV, Roku
- ☐ Other network specific apps

Music Services:

- ☐ Spotify
- ☐ Apple Music
- ☐ Pandora

Media Subscriptions:

- ☐ Newspaper
- ☐ Online Magazines

Books:

- ☐ Kindle
- ☐ Goodreads
- ☐ Audible
- ☐ Apple Books

Photo Sharing and Storage:

- ☐ Shutterfly
- ☐ Flickr
- ☐ Photobucket
- ☐ SmugMug

Gaming Accounts:

- ☐ Xbox
- ☐ PlayStation
- ☐ Kongregate

Online Dating Accounts:

- ☐ Match
- ☐ Tinder
- ☐ eHarmony

Once you have an inventory, you can store it someplace safe like your safe deposit box or in a file that is password protected on your computer. There are also password keeping apps to protect your passwords (NordPass, 1Password, Bitwarden, or iCloud Keychain for Apple users). Make sure that the executor of your estate knows where that list is located so they can reference it when you pass away.



Learn more about the fundamental principles that can help you successfully plan and save for your retirement years by signing up for Brogan Financial's E-Newsletter. You will receive financial planning tips and retirement saving strategies in an easy-to-understand and informative series of messages directly to your inbox twice a month.

Start taking hold of your financial future, and sign up now at www.broganfinancial.com.

A background image of a couple walking on a beach at sunset. The man is wearing a blue patterned shirt and the woman is wearing a grey sweater. They are walking away from the camera towards the ocean. The sky is a mix of orange and blue.

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