

THIS INFORMATION IS PRIVATE, PERSONAL AND CONFIDENTIAL

VITAL PERSONAL INFORMATION FOR:	
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Date of Birth		Social Security Number	
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Financial Accounts	<i>Please include contact information</i>	
Bank accounts	Bank names:	Account nos.:
Brokerage accounts	Brokerage companies:	Account nos.:
Life insurance policies	Insurance companies:	Policy nos.:
IRA's	Custodian:	Account nos.:
Profit sharing and pension plans	Employer:	Plan administrator:
Mortgages	Lenders:	Loan nos.:
Credit cards	Issuers:	Credit card nos.:

Professional Advisors	<i>Name</i>	<i>Address, telephone number, e-mail</i>
Attorney	<i>Jeffrey D. Segal The Segal Law Firm, P.C.</i>	<i>6400 Powers Ferry Road, Suite 400 Atlanta, Georgia 30339 (770) 980-4407 jsegal@segalpc.com</i>
Accountant		
Investments		
Insurance		

Personal Information		
Funeral home and burial plot	Name:	Address:
		Phone:
Locations of:	Wills Trusts Powers of attorney Health care directives	
	Safe deposit box	
	Prior years' tax returns	
	Birth certificate Marriage certificate Military documents	
	Property deeds	
	Vehicle titles	
	Buy-sell, employment, and deferred compensation agreements	
	Stock certificates	
	Jewelry and collectibles	

Passwords	<i>User name</i>	<i>Website or document</i>

PLEASE WRITE ANY OTHER IMPORTANT INFORMATION ON THE REVERSE SIDE