
Personal Document Organizer

wife²cfo



Personal Document Organizer



Family Information

Name _____
Social Security Number _____ Date of Birth _____

Name _____
Social Security Number _____ Date of Birth _____

Child 1 name _____ Date of Birth _____
Child 2 name _____ Date of Birth _____
Child 3 name _____ Date of Birth _____
Child 4 name _____ Date of Birth _____

Residence 1 address _____
Residence 2 address _____
Residence 3 address _____

Legal Document Location

Adoption Certificate _____
Birth Certificate _____
Business Document-Partnership Agreement 1 _____
Business Document-Partnership Agreement 2 _____
Business Document-Partnership Agreement 3 _____
Citizenship Paper _____
Death Certificate _____

Legal Document Location (continued)

Marriage Certificate

Military Paper

Passport

Pre-Post Nuptial Agreement

Professional License-Certification-Degree

Separation-Divorce-Custody Agreement

Social Security Card

Other 1

Other 2

Other 3

Other 4

Other 5

VIPs

Accountant

name _____ phone _____

address _____

email _____

Attorney Divorce

name _____ phone _____

address _____

email _____

Attorney Estate

name _____ phone _____

address _____

email _____

VIPs (continued)

Attorney Real Estate name _____ phone _____
address _____
email _____

Attorney Other 1 name _____ phone _____
address _____
email _____

Attorney Other 2 name _____ phone _____
address _____
email _____

Banker name _____ phone _____
address _____
email _____

Caretaker name _____ phone _____
address _____
email _____

Employer 1 name _____ phone _____
address _____
email _____

Employer 2 name _____ phone _____
address _____
email _____

VIPs (continued)

Executor name _____ phone _____
address _____
email _____

Financial Advisor-Planner 1 name _____ phone _____
address _____
email _____

Financial Advisor-Planner 2 name _____ phone _____
address _____
email _____

Home Manager name _____ phone _____
address _____
email _____

Insurance Agent name _____ phone _____
address _____
email _____

Physician 1 name _____ phone _____
address _____
email _____

Physician 2 name _____ phone _____
address _____
email _____

VIPs (continued)

Physician 3 name _____ phone _____
address _____
email _____

Trustee name _____ phone _____
address _____
email _____

Other 1 name _____ phone _____
address _____
email _____

Other 2 name _____ phone _____
address _____
email _____

Other 3 name _____ phone _____
address _____
email _____

Other 4 name _____ phone _____
address _____
email _____

Other 5 name _____ phone _____
address _____
email _____



Financial Assets & Liabilities

Bank Account 1 name _____
 address _____
 title holder _____
 account type _____ number _____

Bank Account 2 name _____
 address _____
 title holder _____
 account type _____ number _____

Bank Account 3 name _____
 address _____
 title holder _____
 account type _____ number _____

Credit Card 1 bank name _____
 address _____
 title holder _____
 account type _____ number _____

Credit Card 2 bank name _____
 address _____
 title holder _____
 account type _____ number _____

Financial Assets & Liabilities (continued)

Credit Card 3 bank name _____
address _____
title holder _____
account type _____ number _____

Credit Card 4 bank name _____
address _____
title holder _____
account type _____ number _____

Credit Card 5 bank name _____
address _____
title holder _____
account type _____ number _____

Deferred Compensation financial institution _____
address _____
type of account _____ title holder _____
account number _____

Home Equity Line of Credit bank name _____
address _____
title holder _____
account type _____ number _____

Financial Assets & Liabilities (continued)

Investment Account 1 financial institution _____
address _____
title holder _____ account number _____

Investment Account 2 financial institution _____
address _____
title holder _____ account number _____

Investment Account 3 financial institution _____
address _____
title holder _____ account number _____

Mortgage bank name _____
address _____
title holder _____
account type _____ number _____

Partnership 1 name _____
address _____
title owner _____
account number _____

Partnership 2 name _____
address _____
title owner _____
account number _____

Financial Assets & Liabilities (continued)

Partnership 3 name _____
address _____
title owner _____
account number _____

Personal Assets 1 type of asset _____
title owner _____
appraisal/current market value _____

Personal Assets 2 type of asset _____
title owner _____
appraisal/current market value _____

Personal Assets 3 type of asset _____
title owner _____
appraisal/current market value _____

Private Investment 1 name _____
address _____
title owner _____
account number _____

Private Investment 2 name _____
address _____
title owner _____
account number _____



Financial Assets & Liabilities (continued)

Retirement Account 2 financial institution _____
address _____
title holder _____ account number _____

Retirement Account 3 financial institution _____
address _____
title holder _____ account number _____

Other 1 description _____
address _____
title owner _____ acct/ID number _____
other pertinent information _____

Other 2 description _____
address _____
title owner _____ acct/ID number _____
other pertinent information _____

Other 3 description _____
address _____
title owner _____ acct/ID number _____
other pertinent information _____

Insurance Policies (continued)

Homeowner 3 company _____ agent _____
address _____
account number _____

Life company _____ agent _____
address _____
account number _____

Long Term Care company _____ agent _____
address _____
account number _____

Umbrella company _____ agent _____
address _____
account number _____

Other 1 company _____ agent _____
address _____
account number _____

Other 2 company _____ agent _____
address _____
account number _____

Other 3 company _____ agent _____
address _____
account number _____

Residential Maintenance (continued)

Phone-Internet-Cable-Satellite 1 company _____
contact name _____
address _____
phone _____ email _____
frequency of service _____

Phone-Internet-Cable-Satellite 2 company _____
contact name _____
address _____
phone _____ email _____
frequency of service _____

Plumber company _____ contact name _____
address _____
phone _____ email _____
frequency of service _____

Pool-Spa company _____ contact name _____
address _____
phone _____ email _____
frequency of service _____

Roof-Chimney-Gutter company _____ contact name _____
address _____
phone _____ email _____
frequency of service _____

Password Management

Amazon email _____
username _____ password _____

Auto Insurance 1 email _____
username _____ password _____

Auto Insurance 2 email _____
username _____ password _____

Bank Accounts email _____
username _____ password _____

Cable-Internet-Satellite-Streaming 1 email _____
username _____ password _____

Cable-Internet-Satellite-Streaming 2 email _____
username _____ password _____

Commuter Account 1 email _____
username _____ password _____

Commuter Account 2 email _____
username _____ password _____

Credit Card 1 email _____
username _____ password _____

Password Management (continued)

Credit Card 2 email _____

username _____ password _____

Credit Card 3 email _____

username _____ password _____

Credit Card 4 email _____

username _____ password _____

Credit Card 5 email _____

username _____ password _____

Frequent Flyer 1 email _____

username _____ password _____

Frequent Flyer 2 email _____

username _____ password _____

Frequent Flyer 3 email _____

username _____ password _____

Gas & Electric Provider email _____

username _____ password _____

Health Insurance email _____

username _____ password _____

Password Management (continued)

Retailer 2 email _____

username _____ password _____

Retailer 3 email _____

username _____ password _____

Retirement Account 1 email _____

username _____ password _____

Retirement Account 2 email _____

username _____ password _____

Retirement Account 3 email _____

username _____ password _____

Social Media 1 email _____

username _____ password _____

Social Media 2 email _____

username _____ password _____

Social Media 3 email _____

username _____ password _____

Water Provider email _____

username _____ password _____

Password Management (continued)

Other 9

email _____

username _____ password _____

Other 10

email _____

username _____ password _____