



Financial Life Document Organizer

*Purposeful organization to create
calm during life's transitions.*



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6 Meridian Financial Life Document Organizer

The gift of peace of mind. That's what you offer to your loved ones and personal advisors with a completed Financial Life Document Organizer. By having all of your vital information readily available in one place, you're empowering them to act on your behalf as needed in the event of a catastrophe, serious illness, disability, or death.

This resource allows you to gather important aspects of your financial life in one place, such as letters of instruction to key individuals, personal information, important contacts, and essential documents. Your financial advisor can assist you in completing the process.

You've worked hard to build your life. Protect your resources and the ones you love with the knowledge they need.

This document was last updated on

DATE

SIGNATURE

PRINTED NAME



Personal Information

Primary Individual

DATE

NAME

OCCUPATION

EMPLOYER

DATE OF BIRTH

PRIMARY RESIDENCE

HOME PHONE

WORK PHONE

MOBILE PHONE

EMAIL

Spouse / Significant Other / Partner

NAME

OCCUPATION

EMPLOYER

DATE OF BIRTH

WORK PHONE

MOBILE PHONE

EMAIL



Personal Information

Children / Dependents

NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL
NAME	DOB	PHONE	EMAIL

Grandchildren

NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB
NAME	DOB	NAME	DOB



Personal Information

Additional Contacts

NAME	PHONE / EMAIL	RELATIONSHIP
NAME	PHONE / EMAIL	RELATIONSHIP
NAME	PHONE / EMAIL	RELATIONSHIP
NAME	PHONE / EMAIL	RELATIONSHIP
NAME	PHONE / EMAIL	RELATIONSHIP
NAME	PHONE / EMAIL	RELATIONSHIP



Advisors

Personal Advisors

FINANCIAL ADVISOR	EMAIL	PHONE
ATTORNEY	EMAIL	PHONE
ACCOUNTANT	EMAIL	PHONE
PRIMARY PHYSICIAN	EMAIL	PHONE
SPECIALTY PHYSICIAN	EMAIL	PHONE
INSURANCE REPRESENTATIVE	EMAIL	PHONE

Documents

ORIGINAL WILL OR LIVING TRUST DOCUMENTS (SELF) DATED	LOCATION	LAST UPDATED
ORIGINAL WILL OR LIVING TRUST DOCUMENTS (SELF) DATED	LOCATION	LAST UPDATED
POWER OF ATTORNEY / DURABLE POWER OF ATTORNEY	LOCATION	LAST UPDATED
SPECIAL ESTATE INSTRUCTIONS - WRITTEN	LOCATION	LAST UPDATED
TRUST DOCUMENTS	LOCATION	LAST UPDATED



Personal Documents

Family

MARRIAGE CERTIFICATE	LOCATION
MARRIAGE AGREEMENTS (PRE OR POST NUPTIAL)	LOCATION
DIVORCE PAPERS	LOCATION
LIVING WILL	LOCATION
DOCUMENT APPOINTING CHILDREN'S GUARDIAN	LOCATION
PET REGISTRATION & RECORDS	LOCATION
OTHER (E.G. ADOPTION PAPERS)	LOCATION

Identification

BIRTH CERTIFICATE	LOCATION
CITIZENSHIP PAPERS	LOCATION
MILITARY RECORDS	LOCATION
SOCIAL SECURITY CARD	LOCATION
EDUCATION RECORDS	LOCATION
EMPLOYMENT RECORDS (INSURANCE / BENEFITS / 401K STATEMENT / FORMER EMPLOYEE PENSION DOCUMENTS)	LOCATION
LIST OF PROFESSIONAL & FRATERNAL ORGANIZATION MEMBERSHIPS	LOCATION
PASSPORT	LOCATION

Health

HEALTH CARE DIRECTIVE	LOCATION
HEALTH INFORMATION (VACCINATIONS, HOSPITALIZATIONS)	LOCATION



Personal Documents

After Life

FUNERAL ARRANGEMENTS AND BURIAL INFORMATION	LOCATION
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CEMETERY PLOT DEED	LOCATION
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Business / Ownership

PARTNERSHIP / LLC / CORP DOCUMENTS	CONTACT
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Tax Returns & Records

INCOME TAX RETURNS	LOCATION	LAST UPDATED
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RECORDS RE: TAX BASIS OF PROPERTY	LOCATION	LAST UPDATED
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GIFT TAX RETURNS	LOCATION	LAST UPDATED
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Insurance Policies

HEALTH / MEDICAL	COMPANY	POLICY #	LAST UPDATED
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DENTAL	COMPANY	POLICY #	LAST UPDATED
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LIFE INSURANCE - INDIVIDUALS	COMPANY	POLICY #	LAST UPDATED
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LIFE INSURANCE - SURVIVORSHIP	COMPANY	POLICY #	LAST UPDATED
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LIFE INSURANCE - GROUP / EMPLOYER	COMPANY	POLICY #	LAST UPDATED
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LONG-TERM CARE	COMPANY	POLICY #	LAST UPDATED
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DISABILITY	COMPANY	POLICY #	LAST UPDATED
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AUTOMOBILE	COMPANY	POLICY #	LAST UPDATED
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PROPERTY / CASUALTY	COMPANY	POLICY #	LAST UPDATED
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Property Papers

Titles

VEHICLE	LOCATION
BOAT	LOCATION
DEEDS	LOCATION
RENTAL PROPERTIES	LOCATION

Receivables

LOANS RECEIVABLE	LOCATION
LOANED JEWELRY / COVETED BELONGINGS	LOCATION

Safety Deposit Box (If necessary, Safe Box Combination)

LOCATION
LOCATION OF KEYS



Financial Accounts

Assets

INSTITUTION (BANKING / BROKERAGE)	ACCOUNT TYPE	
ONLINE LOGIN	CONTACT	EMAIL OR PHONE #
INSTITUTION (BANKING / BROKERAGE)	ACCOUNT TYPE	
ONLINE LOGIN	CONTACT	EMAIL OR PHONE #
INSTITUTION (BANKING / BROKERAGE)	ACCOUNT TYPE	
ONLINE LOGIN	CONTACT	EMAIL OR PHONE #
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ONLINE LOGIN	CONTACT	EMAIL OR PHONE #
INSTITUTION (BANKING / BROKERAGE)	ACCOUNT TYPE	
ONLINE LOGIN	CONTACT	EMAIL OR PHONE #



Financial Accounts

Credit Cards

INSTITUTION

INSTITUTION

INSTITUTION

Loans

INSTITUTION

INSTITUTION

INSTITUTION

Mortgages

INSTITUTION

INSTITUTION

INSTITUTION

HELOC

INSTITUTION

INSTITUTION

INSTITUTION

Other

INSTITUTION

INSTITUTION

INSTITUTION



Digital Presence

Email Accounts

LOGIN	PASSWORD
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LOGIN	PASSWORD
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LOGIN	PASSWORD
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Password Vault Accounts

LOGIN	PASSWORD
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LOGIN	PASSWORD
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Financial Accounts

CREDIT CARD	LOGIN	PASSWORD
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CREDIT CARD	LOGIN	PASSWORD
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BANKING	LOGIN	PASSWORD
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BANKING	LOGIN	PASSWORD
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BROKERAGE	LOGIN	PASSWORD
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BROKERAGE	LOGIN	PASSWORD
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PAYPAL	LOGIN	PASSWORD
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VENMO	LOGIN	PASSWORD
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MONEY TRANSFER APPS	LOGIN	PASSWORD
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Digital Presence

Security

SECURITY SYSTEM	CODE
PHONE	CODE
COMPUTER	PASSWORD
OTHER	CODE / PASSWORD
OTHER	CODE / PASSWORD
OTHER	CODE / PASSWORD

Cloud Accounts

LOGIN	PASSWORD
LOGIN	PASSWORD

Shopping Accounts

ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD



Social Media Accounts

ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD

Photo / Video Sharing Accounts

ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD

Online File Storage Accounts

ACCOUNT	LOGIN	PASSWORD
ACCOUNT	LOGIN	PASSWORD

