My Personal Financial Profile

Working toward financial wellness is a journey for everyone. Part of that journey is thinking about the future. Write down important information and update it as your information and needs change.

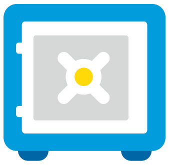
Let’s do this, one step at a time

Writing down your financial and digital life can look like such a big job that you don’t know where to start.

The best way to start is to break it into smaller parts and **take it one step at a time.**

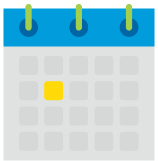
How do I use this?

We’ve broken the profile up into sections and you can easily fill out the document at your pace. The little efforts over time can add up to a lot of helpful information in one place.



Where do I keep it?

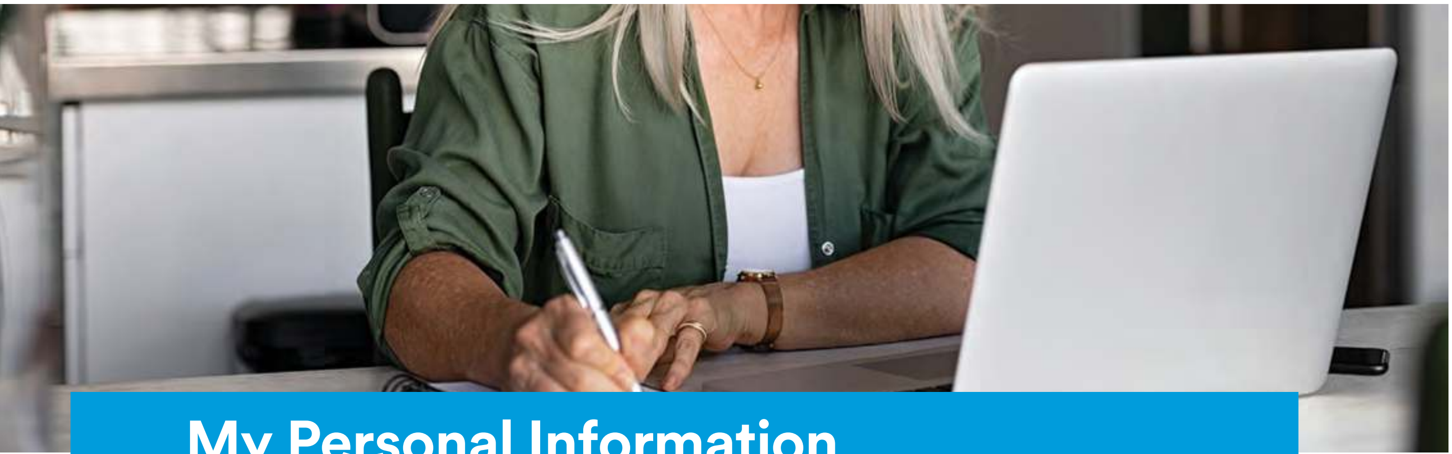
Store this document securely on your computer so it can be updated on an ongoing basis. Print a copy for your records and protect your personal information by keeping it in a safe place. Reprint it as you make significant updates.



When should I update it?

Make updates as your information changes. Pick a day every year to review, such as when you file your taxes, to update this document to ensure all your information is up to date.

Contents



My Personal Information

Name: ______________________________

Date of Birth: ______________________________

Place of Birth: ______________________________

Maiden Name: ______________________________

Mother's Maiden Name: ______________________________

Spouse's Name: ______________________________

Wedding Date / Place: ______________________________

Children's name(s)	Birth Date(s)	Social Security number(s)

Personal Identification Numbers

Social Security #: ______________________________

Drivers License # / State: ______________________________

Passport #: ______________________________

Visa #: ______________________________

Medical Information

Blood Type: ______________________________

Drug Allergies: ______________________________

Are you a blood donor? ______________

Are you an organ donor? ______________

Special Medical Conditions: ______________________________

____

____

____

Medications: ______________________________

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Employer Information

Current Employer Name: ______________________________

Employer Address: ______________________________

Telephone: ______________________________

Hire Date: ______________________________

Employee ID#: ______________________________

Human Resources Contact: ______________________________

Military Information

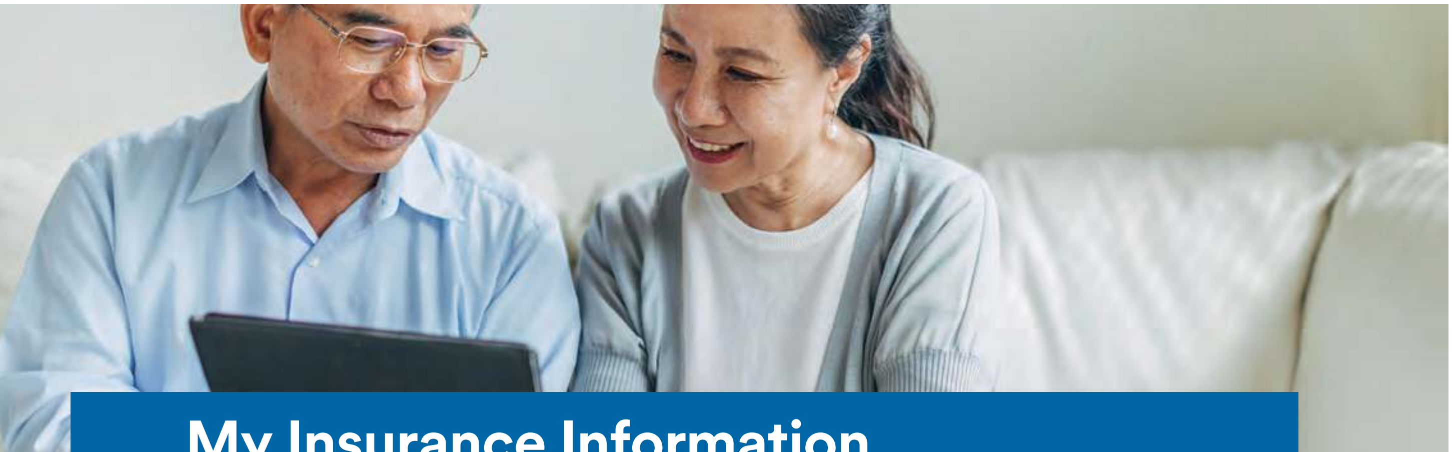
Military Service Branch: ______________________________

Contact: ______________________________

Serial #: ______________________________

Rank: ______________________________

Discharge Date: ______________________________



My Insurance Information

This section is to keep track of your insurance information. Use the spaces labeled as "Other" for special items.

Life Insurance

Company Name: ______________________

Policy #: ______________________ Website: ______________________

Company Name: ______________________

Policy #: ______________________ Website: ______________________

Health Insurance

Company Name: ______________________

Policy #: ______________________ Health Care Plan ID #: ______________________

Group ID#: ______________________ Website: ______________________

Company Name: ______________________

Policy #: ______________________ Health Care Plan ID #: ______________________

Group ID#: ______________________ Website: ______________________

Company Name: ______________________

Policy #: ______________________ Health Care Plan ID #: ______________________

Group ID#: ______________________ Website: ______________________

Disability and Long-Term Care Insurance

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Homeowners / Renters / Flood Insurance

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Auto / Motorcycle / Boat Insurance

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Company Name: ______________________________

Policy #: ______________ Website: ______________

Other Insurance

Company Name: ____________________

What is covered? ____________________

Policy #: ____________________ Website: ____________________

Company Name: ____________________

What is covered? ____________________

Policy #: ____________________ Website: ____________________

Company Name: ____________________

What is covered? ____________________

Policy #: ____________________ Website: ____________________

Company Name: ____________________

What is covered? ____________________

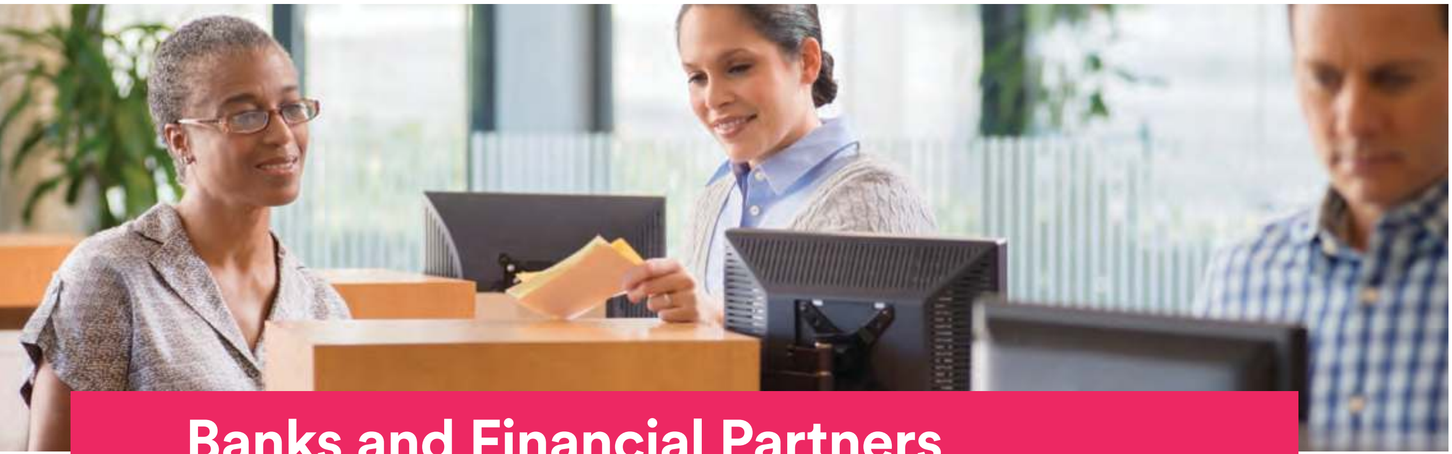
Policy #: ____________________ Website: ____________________

Personal Advisors & Important Contacts

Use this section to document important advisors and contacts in your life.

	Name	Telephone number
Doctors		
Attorney		
Insurance agents		
Financial planner		
Accountant		
Stockbroker		
Banker		
Executor		
Landlord		
Dentist		

	Name	Telephone number
Previous employers (For available Pension and Insurance benefits)		
Other important contacts		



Banks and Financial Partners

Use this section to write down your account information and locations.

Checking Accounts

Bank Name: ______________________ Account #: ______________________

Bank Name: ______________________ Account #: ______________________

Savings Accounts

Bank Name: ______________________ Account #: ______________________

Bank Name: ______________________ Account #: ______________________

Bank Name: ______________________ Account #: ______________________

ATM Cards

Bank Name: ______________________ Account #: ______________________

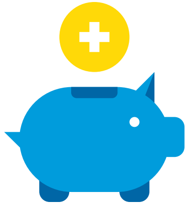
Bank Name: ______________________ Account #: ______________________

Safe Deposit Box

Bank Name: ______________________

Telephone: ______________________

Key Location: ______________________



Certificates of Deposit

Bank Name: ______________________ CD #: ______________________

Maturity Date: ______________________

Bank Name: ______________________ CD #: ______________________

Maturity Date: ______________

Bank Name: ______________________ CD #: ______________________

Maturity Date: ______________

Bank Name: ______________________ CD #: ______________________

Maturity Date: ______________

Money Market Accounts

Institution Name: ______________________ Account #: ______________________

Institution Name: ______________________ Account #: ______________________

Brokerage Accounts for Stocks, Bonds, Mutual Funds, IRAs

Institution Name: ______________________ Account #: ______________________

Contact Name: ______________________ Phone #: ______________________

Institution Name: ______________________ Account #: ______________________

Contact Name: ______________________ Phone #: ______________________

Pensions and Annuities

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Other

____

____

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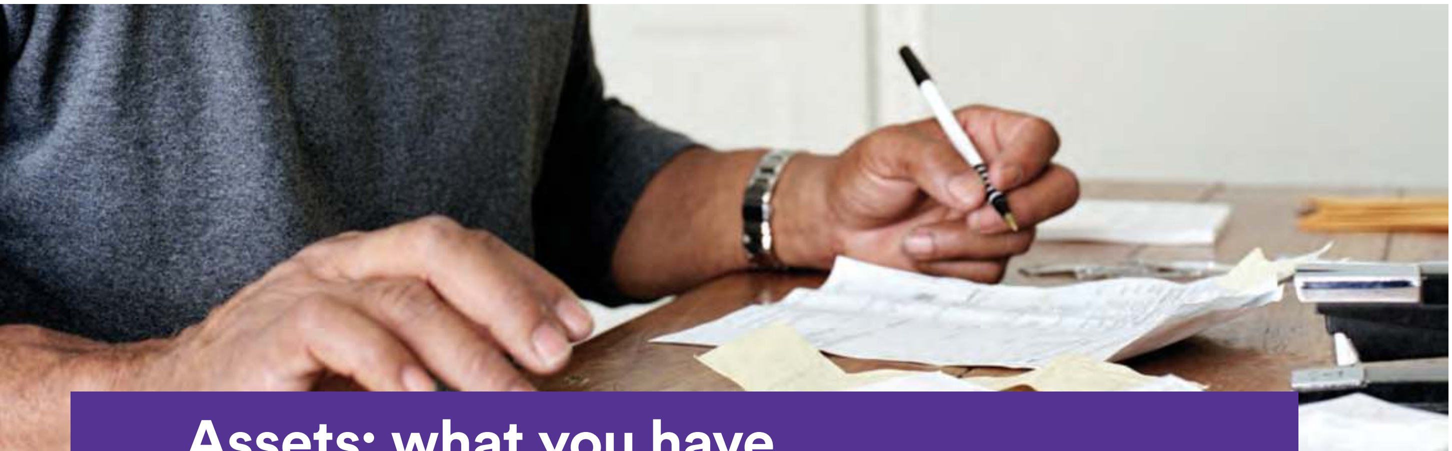

Assets: what you have

Use this section to keep track of what you own including your home, car, financial assets and any other valuables.

Primary Home Address

Address: ______________________________

Mortgage Lender: ______________________________

Telephone: ______________________________

Website: ______________________________

Security Company: ______________________________

Telephone: ______________________________

Account #: ______________________________

Vacation / Timeshare Addresses

Address: ______________________________

Mortgage Lender: ______________________________

Telephone: ______________________________

Website: ______________________________

Security Company: ______________________________

Telephone: ______________________________

Account #: ______________________________

Vehicles (i.e., Cars, Motorcycles, RVs)

Vehicle #1

Make/Model/Year: ______________________________

License Plate # / State: ______________________________

Vehicle #2

Make/Model/Year: ______________________________

License Plate # / State: ______________________________

Vehicle #3

Make/Model/Year: ______________________________

License Plate # / State: ______________________________

Boat

Make/Model/Year: ______________________________

Serial #: ______________________________

Motor ID #: ______________________________

Other Assets (i.e., jewelry, art, special family possessions)

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

Liabilities: Who you owe

Use this section to document your key lenders such as your mortgage company and credit card companies.

Mortgage / Home Equity Lenders

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Institution Name: ______________________ Account/Contact #: ______________________

Automated Payments? Y / N If yes, from where? ______________________

Credit Cards

Name: ______________________ Account # ________________ Exp Date: __________

Name: ______________________ Account # ________________ Exp Date: __________

Name: ______________________ Account # ________________ Exp Date: __________

Name: ______________________ Account # ________________ Exp Date: __________

Name: ______________________ Account # ________________ Exp Date: __________

Name: ______________________ Account # ________________ Exp Date: __________

Automated Payments

Use this section to list any automated payments taking place from your bank accounts such as gym memberships, charitable giving, merchandise subscriptions, entertainment services, etc.

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Service Name: ______________________ Account #: ______________________

Digital Life

As we live more of our lives online, it's important to ensure your loved ones can access your digital accounts after you've gone. This information is highly sensitive and it's critical to keep it safe.

Below are tips to ensure your digital assets can be accessed:

1. Use a password manager

Password managers are software that securely holds all your logins and passwords in one place. These sites also can store your bank numbers, credit card number and other important information. Typically, your account can be linked to other people you trust so they can access it after you pass.

2. Assign custody over your social media accounts

Pick one person to manage your social media accounts by either preserving your memory or deleting them. Facebook, Twitter, LinkedIn and other social media accounts offer options for enabling your loved ones to manage your account.

Some email providers, like Gmail, offer features to turn over control of your account to someone you designate after a set period of inactivity.

3. Backup your files

Get in the good habit of making backups of your files to an external hard drive or use the cloud. Make sure you let your loved ones know the location of your external hard drive or the logins to your cloud storage provider.

Important Document Locations

It's important to write down where you have stored your important documents and how to access them.

Wills / Living Wills / Power of Attorney

Location: ______________________________

Comments: ______________________________

Trust Documents

Location: ______________________________

Comments: ______________________________

Funeral Pre-planning Documents

Location: ______________________________

Comments: ______________________________

Property Deeds

Location: ______________________________

Comments: ______________________________

Vehicle Title(s)

Location: ______________________________

Comments: ______________________________

Passport

Location: ______________________________

Comments: ______________________________

Social Security Card

Location: ______________________________

Comments: ______________________________

Marriage Certificate / Divorce Decree

Location: ______________________________

Comments: ______________________________

Family Death Certificates

Location: ______________________________

Comments: ______________________________

Life / Disability / Health / Long-term Care Insurance Policies

Location: ______________________________

Comments: ______________________________

Homeowners / Renters / Flood / Auto / Pet / Other Insurance Policies

Location: ______________________________

Comments: ______________________________

Safe

Location & Key Location: ______________________________

Combination: ______________________________

Other Important Documents

Item: ______________________________

Location: ______________________________

Comments: ______________________________

Item: ______________________________

Location: ______________________________

Comments: ______________________________

Item: ______________________________

Location: ______________________________

Comments: ______________________________

Additional Notes

Final Thoughts

Putting together your personal financial and digital life information is a huge step in your financial wellness journey. It is also important to remember that you need to periodically review your documents with your tax or legal advisors.

Be sure to update this document when your personal situation changes, such as a new job, birth of a child or grandchild, or any other major change in your health or financial situation. Consider meeting with your family to review this document.

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