



# Personal Asset Archive

Securities and investment advisory services offered through Voya Financial Advisors, Inc., member SIPC.

As your life changes, so does your financial picture. Use this personal asset archive to keep all of your important information organized in one place. Be sure to update your information as changes occur. Since this inventory contains personal and confidential information, please store it in a safe place that is accessible to you, the executor of your estate, and your survivors.

Revision date: \_\_\_\_\_

Personal inventory for: \_\_\_\_\_

Address: \_\_\_\_\_

## Personal information

	Individual	Spouse/partner
Name		
Home phone		
Mobile phone		
Work phone		
Social Security number		
Date of birth		
Place of birth		
Employer		
Manager, phone		
Employer		
Manager, phone		

## Personal contacts

	Individual	Spouse/partner
Children		
DOB		
Phone		
Children		
DOB		
Phone		
Children		
DOB		
Phone		
Parents		
Phone		
Family		
Relation, phone		
Family		
Relation, phone		
Former spouses		
Phone		
Friends		
Address, phone		
Friends		
Address, phone		
Trusted neighbors		
Address, phone		

# Professional contacts

	Individual	Spouse/partner
Accountant		
Phone		
Executor		
Phone		
Power of attorney		
Phone		
Guardian		
Phone		
Lawyer		
Phone		
Financial advisor		
Phone		
Insurance agent		
Phone		
Doctor		
Specialty, phone		
Doctor		
Specialty, phone		
Doctor		
Specialty, phone		
Religious advisor		
Location, phone		
Other advisor		
Type, phone		
Funeral director		
Phone		
Advance directive		

# Special needs

(includes medical issues, developmental issues, behavioral issues or mental health issues)

	Individual	Caregiver
Name		
Relationship		
Special need		
Social Security number		
Guardian		
Phone		
Successor guardian		
Phone		
Power of attorney		
Phone		
Doctor		
Specialty, phone		
Doctor		
Specialty, phone		

# Document location

	Location
Safe deposit box	
Wills/trusts	
Guardianship	
Power of attorney	
Passports	
Birth certificates	
Marriage certificates	
Divorce decrees	
Adoption papers	
Death certificates	
Tax returns	
Insurance policies	
Investment statements	
Loan information	
Property deeds	
Social Security cards	
Vehicle titles	
Employee benefits	
Appraisals	
Other _____	

## Bank accounts

Bank name	Account type	Owners	Account number	Payable on death

## Health savings accounts

Bank name	Owner	Account number	Payable on death

## Brokerage accounts

Company name	Owners	Account number	Transfer on death

## Retirement accounts

Company name	Owner	Plan type	Account number	Beneficiaries

## Mutual fund accounts

Company name	Owner	Account type	Account number	Transfer on death

## Annuities

Company name	Owner/insured	Policy number	Beneficiaries

## Debt

Creditor	Debtor/co-signer	Debt type	Loan number

## Credit cards

Credit card company	Owner	Card number	Phone number

## Life insurance

Company name	Insurance type	Owner/insured	Policy number	Beneficiaries

## Disability insurance

Company name	Insurance type	Owner/insured	Policy number

## Property and casualty insurance

Company name	Insurance type	Covered property	Policy number

## Health insurance

Company name	Insured	Insurance type	Policy number

## Long-term care insurance

Company name	Insured	Insurance type	Policy number

## Real estate

Property type	Address	Tenants	Description/comments



## Business ownership

Business name	Description/comments	Other contact information

## Pets

	Individual	Spouse/partner
Name, type, breed		
Microchip information		
Name, type, breed		
Microchip information		
Veterinarian		
Phone		

## Miscellaneous

Item	Description
Garage code	
Spare key locations	
Security system codes	
Safe key locations	
Safe combinations	
Safe deposit box	
Special hiding places	

## Online accounts

Account	URL	User name	Password

## Notes

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For more information, please contact:

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