Nationwide®
is on your side

Personal info organizer

Everything loved ones need to know in case of an emergency

Welcome to your organizer

This document is designed to help gather all of your important legal, financial, medical, professional and account information in one place.

Having it organized can help you find it quickly and can also minimize additional stress for your loved ones in an emergency.

How to use your organizer

- Scan the book to see what information you'll need (ignore the parts that don't apply to you).
- Fill out the information in the digital format, or print the organizer and fill it in by hand.
- Decide where you'll keep it. **This information is sensitive, so be sure to choose a secure digital or physical location.**
- Tell a trusted loved one (e.g., your partner, spouse or sibling) where your organizer is located.
- Treat yourself! You've taken a step to empower and protect your loved ones.

Lean on your financial professional

This organizer is designed not just to corral your information but also to prompt thoughts about your finances and estate planning. Whether you have questions about saving for retirement, buying life insurance or writing a will, your financial professional is an excellent resource to help you master life's many tasks.

Last updated: ______ / ______ / ______

Personal information

Name:		
Birthdate:		
Birthplace:		
Social Security number:		
Address:		
Military service: ○ Yes ○ No	Branch of service:	Years served:

Work contacts

Employer name:
Employer phone number:
Supervisor’s name:
Supervisor’s phone number:
Supervisor’s email:

What to look for inside

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Key contacts

Name:	Relationship to you:
Address:	
Phone number:	
Name:	Relationship to you:
Address:	
Phone number:	
Name:	Relationship to you:
Address:	
Phone number:	
Name:	Relationship to you:
Address:	
Phone number:	

Medical information

Information	Details
Hospital of choice	
Primary care physician	
Medical power of attorney/ living will/advance care directive	
Medicare card number	
Health insurance or VA policy/card number	
Health care proxy	
Online personal health record	
Dentist	
Other	

Business and personal contacts

Advisors	Name	Phone number
Executor of estate		
Attorney		
Banker		
Broker		
Accountant/ tax preparer		
Insurance agent(s) and life insurance policy number		
Financial planner/investment advisor		
Company benefits administrator		
Other		

Personal finances

Financial firm/ bank name	Account number/ document location	Names, if joint account	Website, username and password	Beneficiary name(s)
Checking accounts				

Personal finances (continued)

Financial firm/ bank name	Account number/ document location	Names, if joint account	Website, username and password	Beneficiary name(s)
Savings/money market accounts				
Certificates of deposit				
Credit cards				
Trust account				
Safe-deposit box and key				
Other				

Retirement accounts

The beneficiary designation needs to be on the retirement account itself. If you're unsure whether it is, contact the financial institution to verify.

Account type	Account number	Financial institution/ trustee	Phone number	Beneficiary name(s)	Website, username and password
401(k), 403(b) or other employer-sponsored plans					
Traditional IRAs					
Roth IRAs					
Keogh, SEP or SIMPLE					
Pension or deferred compensation plan					

Retirement accounts (continued)

The beneficiary designation needs to be on the retirement account itself. If you're unsure whether it is, contact the financial institution to verify.

Account type	Account number	Financial institution/ trustee	Phone number	Beneficiary name(s)	Website, username and password
Annuities					
Social Security benefits					
Other					

Education accounts

Account type	Account number	Financial institution/ trustee	Phone number	Beneficiary name(s)	Website, username and password
529 qualified tuition plan/education IRA/Coverdell ESA					

Real estate

Owner(s)	Address	Property type	Ownership type	Mortgage issuer and account number	Mortgage issuer phone number

Investments

Asset	Account number/ document location	Website, username and password	Issuer/financial institution contact information
Brokerage accounts			
Mutual funds			
Annuities			
Bonds			
Stock certificates			
Savings bonds			
Other			

Insurance

Insurance type	Policy number/document location	Issuer/financial institution contact information
Life		
Homeowners		
Automobile		
Medical		
Disability/accident		
Long-term care		
Other		

Loans

Loan type	Account number/ document location	Lender contact information	Website, username and password
Auto			
Mortgage			
Boats/recreational vehicles			
Personal			
Student			
Other			

Personal property and other valuables

Asset	Purchase price	Storage facility details	Beneficiary name(s)

Valuable papers

Legal documents	Location
Mortgage papers/title	
Homeowners insurance policies	
Birth certificate	
Marriage certificate	
Prenuptial agreement(s)	
Post-nuptial agreement(s)	
Divorce papers	
Adoption papers	
Children's custodial papers	
Naturalization papers/passports	
Social Security card(s)	
Employment records	
Armed forces records/military discharge papers	
Insurance papers (life, health, home, auto)	
CDs/stock certificates	
Savings bonds/bonds	
Brokerage account statements	

Valuable papers (continued)

Legal documents	Location
My safe location and combination	
Off-site storage location, unit number and key	
Motor vehicle title(s)	
Buy/sell or cross-purchase agreements	
Employer contracts	
Deeds or copies to real estate	
My last will and testament	
Spouse’s last will and testament	
Living will	
Life Insurance	
Trust agreements	
Tax returns	
Power(s) of attorney (POA)	
Financial POA	
Medical POA/Health care proxy	
Do not resuscitate order (DNR)	
Other	
Other	

Digital information

Providing access to your digital accounts can help save your family or executor time and hassle. Be sure to update this section frequently, especially the passwords.

Type	Username	Password
Personal computer		
Laptop		
Tablet		
Cellphone		
Voicemail		
House alarm		
Other		
Other		

Digital information (continued)

Account type and email address	Username	Password	How to handle account (e.g., close, notify "friends/followers")
Personal/business email accounts			
Personal/business social media accounts			
Digital media storage accounts (photos, videos, music)			
Rewards/frequent-flier programs			
Medical/fitness programs			
Other key website information			

My wishes

Use this space to leave a message for your loved ones. It can include anything not already covered in this organizer that you think is important for them to know, including your wishes for final arrangements or even a simple message of love.

Final arrangements	
My preplanning documents are located	
If not preplanned, my final wishes are to be: buried/cremated/other	
Burial wishes (e.g., cemetery, location, ashes, other)	
Funeral home	
Clergy	
Obituary	
Donations in lieu of flowers	
Pets	
Other	

Notes

This "getting organized" thing feels good!

Now that you're on a roll, find out what other steps you can take to make sure your family is protected. Talk to your financial professional about important documents such as a living will, a health care power of attorney and other key papers.

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This material is not a recommendation to buy or sell a financial product or to adopt an investment strategy. Investors should discuss their specific situation with their financial professional.

Nationwide and its representatives do not give legal or tax advice. An attorney or tax advisor should be consulted for answers to specific questions.

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