



Nationwide[®]
is on your side

Make it easy
on your
loved ones

Organize your important information

Keep important information in one place

In an emergency, your family members need to be able to locate important information and documents quickly. This booklet was designed to help you organize that information all in one place. Fill out each section and keep your booklet in a secure location, like a lockbox, home safe or safety deposit box. Be sure to let a loved one or the executor of your estate know where it's stored and how to access it.

And remember that Nationwide® is providing this booklet to you as a courtesy. It isn't meant to be used by your insurance professional.

Personal information

Your name:

Birth date:

Birthplace:

Social Security #:

Address:

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Contact list

List your spouse, children/dependents, living parents, grandparents and other relatives or close friends you would like to receive a notification in the case of an emergency.

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

Emergency information

The following is a list of information and documents that your family may need quick access to in an emergency.

Information	Location
Hospital of choice	
Doctor	
Health care power of attorney/living will	
Financial power of attorney	
Medicare, Medicaid, VA cards or numbers	
Health insurance (or MediGap) policy number	
Checkbook	
Prepaid funeral arrangements	
Cemetery plot and number	
Funeral and disposition directions	
Special instructions	
Church	
Preferred clergyman/family advisor	
Preferred charity (for contributions in lieu of flowers)	
Will	
Trust	
Other instructions	

Family advisors

List your personal and business advisors.

Type of advisor	Name	Address and phone number
Accountant/ tax preparer		
Executor of estate		
Attorney		
Banker		
Broker		
Financial planner/ investment advisor		
Insurance agent(s)		
Company benefits administrator		
Doctor(s)		
Dentist		

Valuable papers

The exact location of valuable papers is key. Under “Location,” clearly describe where — desk, drawer, closet, safety deposit box, box, etc. — you keep your valuable papers.

Information	Location
Real estate	
Deed(s) to real estate	
Property improvement records	
Mortgage papers/title	
Mortgage payment receipts	
Homeowners insurance policies	

Information	Location
Personal	
Certificates — birth	
Certificates — baptism/confirmation	
Certificates — marriage	
Certificates — adoption	
Certificates — divorce	
Certificates — death	
Naturalization papers/passports	
Diplomas	
Social Security cards	
Employment records	
Armed forces records	
Family health records	
Spouse's will/trust	
Personal property	
Savings accounts and certificates	
Insurance (life, health, home, auto)	
CDs/Stock certificates	
Savings bonds/bonds	
Brokerage account statements	
Safety deposit box/key	
Tax records	
Cancelled checks and stubs	
Household inventory	
Motor vehicle title(s)	

Financial services

List your accounts and other services.

Financial firm's name/address	Identification number	In whose name
Checking accounts		
Savings accounts		
Certificates of deposit		
Money market certificates		
Trust accounts		
Safety deposit boxes		
Other		

Real estate/business interests

Under "Ownership," tell whether the property is tenancy in common, joint ownership or single ownership.

Property	Location (address)	Name(s) of owner	Ownership	Date acquired	Purchase price

Securities (stocks/bonds/other securities)

Asset	Identification number	Date purchased	Purchase price	Other information (name of owner, no. of shares, maturity date)

Mutual funds

Company name and fund	Identification number	Date purchased	Original amount	Other information (name of owner, no. of shares, maturity date)

Miscellaneous personal property

List motor vehicles, boats, recreational vehicles, jewelry, furs, collectibles (art, antiques, rare books, collections), royalties or patents.

Asset	Date acquired	Purchase price or value	Other information (name of owner, where acquired, where stored)

Property insurance

List your insurance policies.

Agent name	Risk insured	Coverage amount	Policy number	Company
Real estate				
Motor vehicles				
Other property				
Personal liability				
Other				

Life insurance/annuities

Under “Policy,” indicate what kind of contract you have – term, whole, universal or variable life, or a fixed, variable or immediate annuity.

Person insured	Policy	Face value	Policy number	Beneficiary name(s)	Insurance company

Health insurance

List accident, disability, major medical, long-term care and Medicare policies.

Person(s) insured	Policy	Coverage amount	Policy number	Name of group or company providing insurance

Employment record

Family member	Employer's name	Employment dates (start and ending)

Retirement accounts

Account type	Account number	Financial institution/ trustee	Phone number	Beneficiary name(s)
Traditional IRAs				
Roth IRAs				
401(k), 403(b) or other employer-sponsored plans				
Deferred compensation				
Keogh, SEP or SIMPLE				
Pension				
Other retirement investments				

Education accounts

Account type	Account number	Financial institution/ trustee	Phone number	Beneficiary name(s)
Education IRA/ Coverdell ESA				
529 qualified tuition plan				
Custodial account(s)				

Digital information

So much of what we do today is online. 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.

Security codes

Type	Security code/Password
Personal computer	
Laptop	
Tablet	
Cell phone	
Voice mail	
House alarm	
Other	

Digital accounts

Account type	Username	Password	How account should be handled (e.g., closed, "friends/followers" notified)
Personal/business email accounts			
Personal/business social media accounts			



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