

**Organize your finances.
Organize your life.**

Your Name

Today's Date



At First Citizens' we understand how complicated life can be, especially when it comes to managing and organizing your personal finances. There are many complexities when addressing the goals you have for yourself and your family, and there is a value in having the ability to see every aspect of your financial life in whole.

We hope this document helps to give you a view of your entire financial life, and some measure of peace of mind for you and those you hold dear

KEY PERSONAL CONTACTS

Family Member

Name	Telephone
------	-----------

Family Member

Name	Telephone
------	-----------

Friend

Name	Telephone
------	-----------

Friend

Name	Telephone
------	-----------

Primary care physician

Name	Telephone
------	-----------

Other physician

Name	Telephone
------	-----------

Pediatrician Name

Name	Telephone
------	-----------

Guardian for minors

Name	Telephone
------	-----------

Home health aide

Name	Telephone
------	-----------

Primary medical insurance

Name	Telephone
------	-----------

Financial Advisor

Name	Telephone
------	-----------

Attorney

Name	Telephone
------	-----------

Executor

Name	Telephone
------	-----------

Power of attorney

Name	Telephone
------	-----------

Accountant

Name	Telephone
------	-----------

KEY ACCOUNTS

Telephone provider

Provider	Account #
----------	-----------

Cellular phone provider

Provider	Account #
----------	-----------

Cable provider

Provider	Account #
----------	-----------

Gas company

Provider	Account #
----------	-----------

Electric company

Provider	Account #
----------	-----------

Important Documents	Critical Information	I keep these documents in...
Personal		
Example: Social Security card	123-456-7891 (Jane Smith)	Basement safe
Social Security card		
Birth certificate		
Passport/Citizenship (naturalization) papers		
Driver's license number and expiration date		
Marriage certificate		
Divorce or separation papers		
Military discharge papers		
Ownership		
Real estate deeds		
Motor vehicle title		
Other titles of ownership		
Appraisal and inventory of valuable items		
Tax		
Prior years' federal and state tax returns		
Federal/State gift tax returns		
Property and school tax records		

Notes:

Banking Information	Institution Information	Critical Information
---------------------	-------------------------	----------------------

Personal

I still need to:

- | | | |
|---|--|--|
| <input type="checkbox"/> Sign up for Online Banking | <input type="checkbox"/> Register for e-statements | <input type="checkbox"/> Get a Visa CheckCard with Cash Back Rewards |
|---|--|--|

Checking		Account #
		Other
Savings		Account #
		Other
Money market accounts		Account #
		Other
CDs		Account #
		Other
Credit card(s)		Account #
		Other
Debit card(s)		Account #
		Other
Other		
Other		
Other		



Notes:

Life Planning Documents	Provider Contact Information	Doc. Location	Last Updated
Insurance			
Long-term care insurance policy			
Life insurance policy			
Group life policies			
Health and accident insurance cards and claims records			
Mortgage insurance policies			
Veterans administration insurance policy			
Beneficiary forms for insurance policies			
Last will and testament			
Living will/Health care proxy			
Durable power of attorney			
Personal and Charitable Trusts			
Personal trust account		Account#	
Trustee information		Account#	
Charitable trust account		Account#	

Notes:

Credit and Lending Documents	Institution Information	Critical Information
------------------------------	-------------------------	----------------------

Personal

I still need to discuss:

Home financing

Equity loans and lines

Auto loans

Mortgage		Account #
		Doc. Location
Home equity line		Account #
		Doc. Location
Auto loan		Account #
		Doc. Location
Education loans		Account #
		Doc. Location
Other outstanding loans		Account #
		Doc. Location
Promissory notes		Account #
		Doc. Location
Rental and/or lease agreements		Account #
		Doc. Location

Small Business Documents	Institution Information	Critical Information
--------------------------	-------------------------	----------------------

Ownership

I still need to:

Learn more about the First @ Work program

Corporate/Ownership papers		
Financing papers		
Buy/Sell or partnership agreements		
Credit card(s) & Statements		Account #
		Doc. Location
Account(s)		Account #
		Doc. Location

Employment

Payroll records		
Employment records		
Other employee benefit plans		



Notes: