

My Personal Atlas



Name: _____

Last Updated: _____

In *My Personal Atlas*, I have taken care to document the location of all of my important contacts, documents, wishes and information so that this may serve as an easy reference guide to my family or friends should they need to manage my affairs on my behalf.

Important Contacts

List any other contacts (trustees and organizations) that you serve with/support that should understand your change in status

Contact	Name	Phone	Email
Financial Advisor			
Tax Advisor			
Attorney			
Power of Attorney			
Executor			
Trustee			
Employee Benefits/HR			
Funeral Director			

Important Documents

My Identification	Location	Notes
Birth Certificate		
Social Security Number ()		
Marriage or Partnership Document(s)		
Divorce Decree/QDRO		
Passport		
Citizenship Documents		
Medicare Card and ID ()		
Adoption/Guardian Certificate		
My Wishes and Agreements	Location	Notes
Letters to Family and Friends		
Funeral Instructions		
Will		
Health Care Proxy		
Living Will		
MOLST/POLST*		
Prenuptial Agreement		
Trust Agreements		
LLC and Business Documents		
Additional	Location	Notes
Safe-Deposit Box and Keys		
Military Discharge Papers		

* Medical or Physical Orders for Life-Sustaining Treatment

Electronic Devices

Equipment Name	Access Information

Financial Accounts

Institution Name/Type	Account #	Access Information (User Name/PW/Web or Phone)

Social Media Accounts

Account Type	Username	Password

Home Information

Residence	Primary	Secondary
Deed		
Mortgage		
Home Equity		

Vehicles: Automobiles, Motorcycles, Boats, etc

Vehicle Name			
Registration			
Inspection Date			
Bill of Sale			
Finance/Lease Agreement			

Insurance Information

Insurance Type	Policy Owner	Company	Policy # / Location of Info
Life Insurance (Type:)			
Life Insurance (Type:)			
Disability Insurance			
Homeowner's Insurance			
Automobile Insurance			
Umbrella Policy			
Health Insurance			