MY IMPORTANT INFORMATION

So the people you love aren't left guessing.

COATS INSURANCE SERVICES • PROTECTING WHAT MATTERS MOST • LAURENS, SC

Fill this out once, **tell a trusted person where you keep it**, and update it once a year or after any big life change. In a crisis, this one sheet saves your family hours of hunting through drawers, files, and phones.

1 ABOUT ME

FULL NAME _____ DATE OF BIRTH _____

ADDRESS _____

PHONE _____ EMAIL _____

SPOUSE / PARTNER NAME _____

2 IN AN EMERGENCY, CALL

1. NAME _____ RELATIONSHIP _____ PHONE _____

2. NAME _____ RELATIONSHIP _____ PHONE _____

3 MY DOCTORS & PHARMACY

PRIMARY DOCTOR _____ PHONE _____

PHARMACY _____ PHONE _____

PREFERRED HOSPITAL _____

4 WHERE MY IMPORTANT DOCUMENTS ARE KEPT

Write where each one is - drawer, safe, bank box, attorney

Last will & testament	LOCATION	
Financial power of attorney	LOCATION	
Health care power of attorney	LOCATION	
Living will	LOCATION	
House deed	LOCATION	
Vehicle titles	LOCATION	
Birth certificate	LOCATION	
Marriage certificate	LOCATION	
Military records (DD214)	LOCATION	
Social Security card	LOCATION	
Passport	LOCATION	

5 MY INSURANCE POLICIES

COVERAGE	COMPANY	POLICY #	PHONE
Life insurance			
Final expense			
Health / Medicare supplement			
Dental & vision			
Auto			
Home			

My insurance agent: _____ **Phone:** _____

6 BANK & FINANCIAL ACCOUNTS

Caution: Write only the last 4 digits of account numbers on this sheet - never full numbers or passwords.

BANK / INSTITUTION	ACCOUNT TYPE	LAST 4 DIGITS
Retirement accounts		
Investment accounts		

7 MY FUNERAL WISHES

FUNERAL HOME PREFERENCE _____ BURIAL OR CREMATION ☐ Burial ☐ Cremation

SERVICE WISHES - MUSIC, READINGS, WHO SHOULD BE NOTIFIED _____

PREPAID ARRANGEMENTS? ☐ Yes ☐ No PAPERWORK IS KEPT _____

8 OTHER THINGS MY FAMILY SHOULD KNOW

PETS - NAMES _____ VET + PHONE _____

WHO SHOULD CARE FOR MY PETS _____

MY LIST OF ONLINE ACCOUNTS / PASSWORDS IS KEPT (LOCATION ONLY) _____

Please note: This organizer is an informational aid from Coats Insurance Services - it is not a legal document and does not replace a will, power of attorney, or beneficiary designations. Store the completed sheet in a safe place, tell a trusted person where it is, and review it once a year or after any big life change. Questions about coverage? Call or text Coats Insurance Services at **(864) 715-2337**.