



PEACE OF MIND PLANNING Information Collection

Milford United Methodist Church
1200 Atlantic Street
Milford, MI 48381

The best way to hand off information is to complete this document & create a binder with one statement from each of the companies listed below.

IMPORTANT PERSONAL INFORMATION

Full Legal Name _____	E-Mail - 1 _____
Social Security Number _____	Password _____
Birthdate _____	E-Mail - 2 _____
Address _____	Password _____
Cell Phone Number: _____	Cell Phone Login Code: _____

INITIAL ITEMS TO PUT IN BINDER - Originals will be required!

- | | | | | |
|------------------------|----------------|--|-----------------------------|---------------------------------|
| 1 Personal Will | 2 Trust | 3 Advance Health Care Directive | 4 House / Car Titles | 5 Cemetary/Burials Info. |
|------------------------|----------------|--|-----------------------------|---------------------------------|

Additional Documents & Information to Gather

Utilities - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
Electric: _____	_____	_____	_____	_____
Gas: _____	_____	_____	_____	_____
Water: _____	_____	_____	_____	_____
Cable: _____	_____	_____	_____	_____
TV: _____	_____	_____	_____	_____
Phone: _____	_____	_____	_____	_____
Cell Phone: _____	_____	_____	_____	_____

Bank Account - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1	_____	_____	_____	_____
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2	_____	_____	_____	_____
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3	_____	_____	_____	_____
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4	_____	_____	_____	_____
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Retirement Accounts - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1	_____	_____	_____	_____
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2	_____	_____	_____	_____
---	-------	-------	-------	-------

3	_____	_____	_____	_____
---	-------	-------	-------	-------

4	_____	_____	_____	_____
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Life Insurance Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1	_____	_____	_____	_____
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2	_____	_____	_____	_____
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Auto Insurance - Company Name	Policy Number	Phone Number	ONLINE Login	ONLINE Password
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1	_____	_____	_____	_____
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2	_____	_____	_____	_____
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Home Owners Insurance - Company Name	Policy Number	Phone Number	ONLINE Login	ONLINE Password
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1	_____	_____	_____	_____
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Loans - Mortgage & Car - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1				
2				
3				

Credit Cards - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Other Miscellaneous Accounts - Company Name	Account Number	Phone Number	ONLINE Login	ONLINE Password
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1				
2				

3

4

Often Online Accounts Ask Security Question with Answers

Security Questions

Security Answers

1

2

3

4

5

6

7

8

1

2

3

4

5

6

7

8