

# Master Directory

PREPARED FOR:

DATE: / /

## You'll Need:

- Net Worth Statement if you've completed it
- All of your financial account numbers, as well as passwords and the names and phone numbers of any advisors you use

## DIRECTORY: KEY INDIVIDUALS

### Attorney

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Accountant

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Insurance Agent

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Financial Advisor

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Human Resources Contact

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Banker

Name \_\_\_\_\_ Firm \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

Safe-Deposit Box \_\_\_\_\_ Key Location \_\_\_\_\_

**DIRECTORY: ASSETS****Bank Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Brokerage Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Brokerage Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Mutual Fund Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Mutual Fund Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**IRA Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**IRA Account**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**DIRECTORY: ASSETS, CONTINUED**

**Company Retirement Plan**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Company Retirement Plan**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Corporate Business Interest**

Company	Contact	Phone Number
# of Shares You Own	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Real Estate**

Description	Owner	
Address		Amount (\$) (Fair Mrkt Val) <input type="text"/>

**Real Estate**

Description	Owner	
Address		Amount (\$) (Fair Mrkt Val) <input type="text"/>

**Life Insurance/Annuity**

Company	Contact	Phone Number
Policy #	Document Location/URL	
User Name	Password	Amount (\$) (Death Bnft) <input type="text"/>

**Life Insurance/Annuity**

Company	Contact	Phone Number
Policy #	Document Location/URL	
User Name	Password	Amount (\$) (Death Bnft) <input type="text"/>

**DIRECTORY: LIABILITIES**

**Home Loan**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Home Loan**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Home Equity Loan/Line of Credit**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Credit Card**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Credit Card**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>

**Other Liabilities**

Company	Contact	Phone Number
Account #	Document Location/URL	
User Name	Password	Amount (\$) <input type="text"/>