



# Confidential Family Records

Use this worksheet to help you organize your confidential financial information.

Upon completion, keep this worksheet in a secure location and make sure that your primary contact knows how to find important documents.

Name: \_\_\_\_\_ Date of Completion: \_\_\_\_\_

OnTrack is a private, nonprofit, United Way funded agency offering free and confidential budget and credit counseling. We invite you to take advantage of our one-on-one counseling services, participate in our education programs, and learn to manage your money and credit better!

**Family References (Spouse, Partner, Mother, Father, Guardian)**

Identifying Information	You:	Primary Contact:	Secondary Contact:	Other:
Relationship				
Date of Birth				
Social Security #				
Home Address				
Home Phone				
Cell Phone				
Work Contact				

**Other Family References (Siblings, Children, Aunts, Uncles)**

Identifying Information	Name:	Name:	Name:	Name:
Relationship				
Date of Birth				
Social Security #				
Home Address				
Home Phone				
Cell Phone				
Work Contact				

**Insurance (Life, Health, Disability, not including property)**

Type	Company	Company Contact	Policy #	Beneficiary

**Professional Contacts**

**Will: Attorney/Law Office:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Accountant:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Other:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Location of Important Documents**

**Marriage certificate:** \_\_\_\_\_  
**Birth certificates:** \_\_\_\_\_  
**Other: (Adoption papers, Naturalization papers, etc)** \_\_\_\_\_  
**Military Service #:** \_\_\_\_\_ **Branch:** \_\_\_\_\_  
**Dates of service:** \_\_\_\_\_ **Location of discharge papers:** \_\_\_\_\_

**Personal Property (Home, Land, Car, Boat, Business)**

**Primary Residence:** \_\_\_\_\_  
**Name on Title:** \_\_\_\_\_ **Location of Title/Deed:** \_\_\_\_\_  
**Mortgage Lender:** \_\_\_\_\_ **Contact:** \_\_\_\_\_  
**Homeowners Insurance Policy:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Other Real Estate:** \_\_\_\_\_  
**Name on Title:** \_\_\_\_\_ **Location of Title/Deed:** \_\_\_\_\_  
**Mortgage Lender:** \_\_\_\_\_ **Contact:** \_\_\_\_\_  
**Insurance Policy:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Automobile Type:** \_\_\_\_\_ **Year/Make/Model:** \_\_\_\_\_  
**Name on Title:** \_\_\_\_\_ **Location of Title:** \_\_\_\_\_  
**Lender:** \_\_\_\_\_ **Contact:** \_\_\_\_\_  
**Insurance Policy:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Automobile Type:** \_\_\_\_\_ **Year/Make/Model:** \_\_\_\_\_  
**Name on Title:** \_\_\_\_\_ **Location of Title:** \_\_\_\_\_  
**Lender:** \_\_\_\_\_ **Contact:** \_\_\_\_\_  
**Insurance Policy:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Other Property:** \_\_\_\_\_ **Owner:** \_\_\_\_\_  
**Lender:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Investments (Retirement, Stocks, Bonds)**

**Type of Account:** \_\_\_\_\_ **Owner:** \_\_\_\_\_  
**Beneficiary:** \_\_\_\_\_ **Broker/Advisor:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Type of Account:** \_\_\_\_\_ **Owner:** \_\_\_\_\_  
**Beneficiary:** \_\_\_\_\_ **Broker/Advisor:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Type of Account:** \_\_\_\_\_ **Owner:** \_\_\_\_\_  
**Beneficiary:** \_\_\_\_\_ **Broker/Advisor:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Loans Payable to you**

**Recipient:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

**Recipient:** \_\_\_\_\_ **Contact:** \_\_\_\_\_

