



## **Personal Financial Organizer**

Creating a Well-Ordered Life

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Keeping important documents and financial records organized and readily available is one of the best gifts you can give those you love. In the event of a catastrophe, serious illness, disability or death, your Personal Financial Organizer (PFO) can immediately provide vital and timely information to both your family and professional advisors.

# Contents

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## **Personal Information**

- Contact Information
- Family Information
- Advisors' Information
- Letters of Instruction

## **Wealth Management**

- Most Recent Financial Plan
- Year-end Brokerage Statements
- Year-end Retirement Statements

## **Risk Management**

- Life Insurance Policies
- Long-term Care, Disability, Car, Umbrella Insurance
- Annuity Contracts

## **Tax Management**

- Accountant Information
- Last Individual Tax Return
- Last Business Tax Return

## **Cash Management**

- Year-end Bank Statements
- List of Bank Accounts
- List of Credit Cards
- Lines of Credit

## **Estate Planning**

- Estate Attorney Information
- Essential Document Locator

## **Real Estate**

- Primary and Vacation Home Information
- Investment Properties
- Realtor, Lender, Real Estate Attorney Information

## **Health & Medical**

- Health Care Proxy/Advance Medical Directive
- Physician and Other Health Professional t Information
- Pharmacy
- List of Medications

## **Digital Assets**

- Websites & Passwords

## **Misc. Information**

- Funeral and Burial Requests

# Personal Information

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## ■ Contact Information

Primary Person	Spouse / Significant Other
Name: DOB: Address:	Name: DOB: Address:
Home Phone: Mobile Phone: Work Phone: Email:	Home Phone: Mobile Phone: Work Phone: Email:

## ■ Children / Dependents

Name: DOB: Phone Number:	Name: DOB: Phone Number:	Name: DOB: Phone Number:
Name: DOB: Phone Number:	Name: DOB: Phone Number:	Name: DOB: Phone Number:

## ■ Grandchildren

Name: DOB: Phone Number:	Name: DOB: Phone Number:	Name: DOB: Phone Number:
Name: DOB: Phone Number:	Name: DOB: Phone Number:	Name: DOB: Phone Number:

## ■ Emergency Contacts

Name: Phone Number: Relationship:	Name: Phone Number: Relationship:	Name: Phone Number: Relationship:
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# Professional Advisors' List

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## Financial Advisor(s)

<b>Name:</b> Eric Stevens / The Stevens Group at Morgan Stanley <b>Phone Number:</b> 856-489-2556 <b>Address:</b>  303 Lippincott Drive, Suite 300 Marlton, NJ 08053  <b>Email:</b> Eric.Stevens@morganstanley.com	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>
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## Attorney(s)

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>
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## Accountant(s)

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>  <b>Email:</b>
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## Primary Physician

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**Name:**  
**Phone Number:**  
**Address:**

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**Email:**

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# Letters of Instruction

Take the time to draft clear instructions to ensure your loved ones have adequate guidance.

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**People to Notify:**

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**Immediate Cash Needs:**

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**Funeral Arrangements:**

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**Other (e.g., Business Arrangements):**

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# Wealth Management

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# Risk Management

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# Tax Management

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# Accountant Information

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## Accountant(s)

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>

# Cash Management

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# Bank Accounts & Credit Cards & Lines of Credit

## Bank Accounts

Bank Name: Account Number: Type of Account:	Bank Name: Account Number: Type of Account:	Bank Name: Account Number: Type of Account:
Bank Name: Account Number: Type of Account:	Bank Name: Account Number: Type of Account:	Bank Name: Account Number: Type of Account:

## Credit/Debit Cards

Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:	Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:	Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:
Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:	Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:	Issuer: Card Number: PIN: Type (Credit/Debit): Phone Number:

## Lines of Credit

Bank Name: Account Number: Credit Amount:	Bank Name: Account Number: Credit Amount:	Bank Name: Account Number: Credit Amount:
Bank Name: Account Number: Credit Amount:	Bank Name: Account Number: Credit Amount:	Bank Name: Account Number: Credit Amount:

# Estate Planning

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# Estate Attorney Information

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## Estate Attorney(s)

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>

# Essential Document Locator

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## ■ Safe Deposit Box Location

Safe Deposit Box Location(s)	Key Location(s)

Fireproof Box Location(s)	Key or Combination Location(s)

File Cabinet Location(s)	Key Location(s)

Safe Location	Key or Combination Location(s)



# Real Estate

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# Realtor/Lender/Attorney Information

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## Realtor/Lender/Attorney

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>
<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>
<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>

# Health & Medical

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# Physician & Health Professionals

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## Physicians & Health Professionals

<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>
<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>
<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>	<b>Name:</b> <b>Phone Number:</b> <b>Address:</b>
<b>Email:</b>	<b>Email:</b>	<b>Email:</b>

# Pharmacy & Medical Information

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## ■ Pharmacy

Name:  
Phone Number:  
Address:

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## ■ Blood Type

Blood Type:

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## ■ Food Allergies

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## ■ Drug Allergies

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## ■ Current Medications

Medication	Dosage	Purpose	Generic OK (Y/N)

# Digital Assets

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# Websites & Passwords

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 **Websites & Passwords**

Website	Description	Username	Password

## Misc. Information

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# Funeral & Burial Requests

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## Funeral & Burial Requests

**Preferred or Selected Funeral Home**

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**Burial Plot Information**

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**Desired Location of Funeral Services**

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**Wishes for My Body/Burial**

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