

Key Contacts & Important Information

As you plan for your goals, needs, milestones and unexpected events, use this document to help keep track of key advisors, contacts and other important information.

Personal/Advisors

	Name	Phone	Email
Accountant/Tax Preparer			
Attorney			
Business Partner			
Estate Executor/Personal Representative			
Emergency Contact			
Financial Advisor			
General Insurance Agent			
Life Insurance Agent			
Power of Attorney			
Trustee			
Other			

Medical

	Phone	Email	Notes
Primary Care Physician			
Dentist			
Optometrist			
Pharmacist			

Medical (cont.)

	Specialty	Phone	Email	Notes
Specialist				
Specialist				
Specialist				
Other				
Other				
Other				

Records, Policies & Other Important Documents

Store documents in a secure location, and make sure copies are shared with key advisors and family members, as appropriate. In addition, consider digital storage options, such as Hightower’s Client Portal.

	Last Reviewed	Location
Car Title/Lease		
2 nd Car Title/Lease		
Mortgage		
Real Estate Deeds		
Home Equity		
Will		
Trusts		
Power of Attorney		
Health Care Proxy		
HIPAA		
Health Care Directive		
Organ Donation		
Living Will/Medical Directive		

Records, Policies & Other Important Documents (cont.)

	Last Reviewed	Location
Medical Records		
Funeral Arrangements		
Financial Records		
Life Insurance Policies		
Long-term Care Insurance Policies		
Other Insurance Policies		
Safe Deposit Box		

Online Life

	Username	Password Hint
Digital File Storage		
Email 1		
Email 2		
LinkedIn		
Facebook		
Instagram		
Other Social Media		