



# Beneficiary Planner

## Using Your Beneficiary Planner

Collecting vital details about your finances, contracts, and other day-to-day matters is one of the last things you'll want to trouble your loved ones with after you're gone.

This *Beneficiary Planner* is your gift and a comprehensive place for your important data. Take some time to fill in this convenient organizer and put it in a secure place. Then, share your *Planner's* location with someone you trust. Remember to review your information annually to keep it current.

Thank you.

## You & Your Family

Full Name \_\_\_\_\_

Primary Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

PO Box \_\_\_\_\_

Birthdate and Place \_\_\_\_\_

Social Security # \_\_\_\_\_

License/ID Type & Number \_\_\_\_\_

Email \_\_\_\_\_ Password \_\_\_\_\_

Single       Married       Widow/Widower       Divorced

Spouse's Name \_\_\_\_\_

Children's Names

\_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_ Phone \_\_\_\_\_

Family Birth Certificates Location(s) \_\_\_\_\_

## Your Professional Contacts

### *Your Attorney's Name, Address, and Phone Number*

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Email Address \_\_\_\_\_

### *Your Doctor's Name, Address, and Phone Number*

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Email Address \_\_\_\_\_

### *Your Accountant's Name, Address, and Phone Number*

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Email Address \_\_\_\_\_

## Your Employment

Actively working

Retired

Employer \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Website \_\_\_\_\_

## Your Military Service

Branch of Service \_\_\_\_\_ Rank at Discharge \_\_\_\_\_

Date & Place of Discharge \_\_\_\_\_

Military Service # \_\_\_\_\_

## Your Important Document Locations

Will \_\_\_\_\_

Birth Certificate \_\_\_\_\_

Marriage Certificate \_\_\_\_\_

Military Discharge Papers \_\_\_\_\_

Tax Records \_\_\_\_\_

Insurance Policies \_\_\_\_\_

Car Title \_\_\_\_\_

Car Registration \_\_\_\_\_

Safe Deposit Box \_\_\_\_\_

Safe Deposit Box # \_\_\_\_\_

Safe Deposit Box Key \_\_\_\_\_

## Your Insurance

Policy Type \_\_\_\_\_

Policy # \_\_\_\_\_ Policy Amount \_\_\_\_\_

Insurance Company \_\_\_\_\_

Contact and Phone # \_\_\_\_\_

Website \_\_\_\_\_ Agent email \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Policy Type \_\_\_\_\_

Policy # \_\_\_\_\_ Policy Amount \_\_\_\_\_

Insurance Company \_\_\_\_\_

Contact and Phone # \_\_\_\_\_

Website \_\_\_\_\_ Agent email \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Policy Type \_\_\_\_\_

Policy # \_\_\_\_\_ Policy Amount \_\_\_\_\_

Insurance Company \_\_\_\_\_

Contact and Phone # \_\_\_\_\_

Website \_\_\_\_\_ Agent email \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Policy Type \_\_\_\_\_

Policy # \_\_\_\_\_ Policy Amount \_\_\_\_\_

Insurance Company \_\_\_\_\_

Contact and Phone # \_\_\_\_\_

Website \_\_\_\_\_ Agent email \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## **Your Bills**

### ***Utilities***

Company \_\_\_\_\_ Website \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Utilities***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Mobile Phone***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Cable/Internet***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## Your Bills (continued)

### ***Subscriptions***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Subscriptions***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Other Autopay Accounts***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Other Autopay Accounts***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Other Autopay Accounts***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Other Debts/Loans***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

### ***Other Debts/Loans***

Company \_\_\_\_\_

Account # \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## Your Bank/Credit Union Accounts

Account Type \_\_\_\_\_ Bank/Credit Union \_\_\_\_\_

Account # \_\_\_\_\_ Card # \_\_\_\_\_ Contact \_\_\_\_\_

Address \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Account Type \_\_\_\_\_ Bank/Credit Union \_\_\_\_\_

Account # \_\_\_\_\_ Card # \_\_\_\_\_ Contact \_\_\_\_\_

Address \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Account Type \_\_\_\_\_ Bank/Credit Union \_\_\_\_\_

Account # \_\_\_\_\_ Card # \_\_\_\_\_ Contact \_\_\_\_\_

Address \_\_\_\_\_ Phone # \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## Your Credit Cards

Credit Card Company \_\_\_\_\_

Card # \_\_\_\_\_ Phone # \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Credit Card Company \_\_\_\_\_

Card # \_\_\_\_\_ Phone # \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Credit Card Company \_\_\_\_\_

Card # \_\_\_\_\_ Phone # \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## Your Investments

Investment Name \_\_\_\_\_ Account # \_\_\_\_\_

Company/Broker \_\_\_\_\_ Phone # \_\_\_\_\_

Contact \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Investment Name \_\_\_\_\_ Account # \_\_\_\_\_

Company/Broker \_\_\_\_\_ Phone # \_\_\_\_\_

Contact \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## Your Retirement Plans & Pensions

Plan Type \_\_\_\_\_ Account # \_\_\_\_\_

Company \_\_\_\_\_ Phone # \_\_\_\_\_

Contact \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Plan Type \_\_\_\_\_ Account # \_\_\_\_\_

Company \_\_\_\_\_ Phone # \_\_\_\_\_

Contact \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Plan Type \_\_\_\_\_ Account # \_\_\_\_\_

Company \_\_\_\_\_ Phone # \_\_\_\_\_

Contact \_\_\_\_\_

Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_



## Your Real Estate

### ***Primary Residence***

Own

Rent

Deed or Lease Location \_\_\_\_\_

Bank or Mortgage Company

Landlord

Address \_\_\_\_\_ Name \_\_\_\_\_

State \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Contact & Phone # \_\_\_\_\_

Email \_\_\_\_\_

### ***Other Real Estate***

Property Type \_\_\_\_\_ Account # \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact & Phone # \_\_\_\_\_

Email \_\_\_\_\_

## Your Vehicles

Make \_\_\_\_\_ Model \_\_\_\_\_ Year \_\_\_\_\_

License Plate \_\_\_\_\_ VIN \_\_\_\_\_

Vehicle Location \_\_\_\_\_

Make \_\_\_\_\_ Model \_\_\_\_\_ Year \_\_\_\_\_

License Plate \_\_\_\_\_ VIN \_\_\_\_\_

Vehicle Location \_\_\_\_\_

## Your Pets

Pet's Name \_\_\_\_\_ Pet Type \_\_\_\_\_

Favorite Food/Treats \_\_\_\_\_

Medication \_\_\_\_\_

Pet's Name \_\_\_\_\_ Pet Type \_\_\_\_\_

Favorite Food/Treats \_\_\_\_\_

Medication \_\_\_\_\_

Other Important Information \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Vet's Name \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Your Social Media/Other Accounts and Passwords

Account type \_\_\_\_\_ Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Account type \_\_\_\_\_ Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Account type \_\_\_\_\_ Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

Account type \_\_\_\_\_ Website \_\_\_\_\_

Username \_\_\_\_\_ Password \_\_\_\_\_

## **Your Special Requests or Wishes**



**Colonial Penn Life Insurance Company**  
In NY, Bankers Conesco Life Insurance Company

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