Your personal assets and inventory organizer

TIAA Wealth Management





Getting organized

Most of us have an array of important papers and personal information to keep safe. How quickly could you locate this information if it were immediately needed? In our experience, very few people can find their most important documents when a need arises. And as we age, for many of us, our memory gradually declines, making it even more difficult to remember where this information is filed. Imagine how hard it might be for your loved ones if you become incapacitated and the information they need to handle your affairs can't be found.

The purpose of this guide is to help you (and your loved ones if you are incapacitated or die) locate all of your vital personal and financial information. It covers a variety of critical topics—from your family records to legal documents. This easy-to-use resource is just one way TIAA is dedicated to helping you and your family prepare for financial well-being and security.

Remember, we're here whenever you need us—to answer your questions and provide you with the information you need to help ensure your loved ones have the appropriate amount of financial protection. TIAA and its partners offer a wide selection of retirement plans, IRAs, after-tax annuities, education savings, investment management, estate planning capabilities, life insurance, and banking, all provided with the expertise and experience of TIAA.

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Personal information

This collection of information about yourself and your family is the starting point for your preparation.

1. Gather your personal identification documents as well as those of family members—including drivers' licenses, Social Security cards, and birth certificates.
2. After the identification documents are assembled, make acid-free color copies of each document should any page be lost or stolen.
3. Once the information is completely filled out, keep all originals in a safe place. Remember to save any government contact information to replace any official documents.

Personal information

Your information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Spouse/Partner information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Personal information (continued)

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Personal information (continued)

Other

Name and relationship (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Other

Name and relationship (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue

Other

Name and relationship (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (Married/Civil union/De facto [common-law])

License number

State of issue



Insurance

Insurance, whether homeowner's, life, disability, or long-term care, is an integral part of your financial well-being and can provide your loved ones with peace of mind against the unexpected. To ensure that a policy is not overlooked, consider having each policy inventoried, accessible, and current.

1. Gather all documents that pertain to your life, health, dental, home, auto, and other liability insurance coverage. Keep contact information for your providers as well.

2. Make copies of your original insurance coverage documents and store them in a safe place. You, your caregiver, or your survivors may need reliable and easy access should there ever be a need to file a claim.

3. Do any of your insurance policies include "riders" that your caregiver or survivors should be aware of? For example, some life insurance policies include a long-term care rider, making it possible for a portion of the death benefit to potentially be used for long-term care, if needed. Make certain to call attention to any such riders, so that you take advantage of all available policy benefits.

4. Review and compile information on group policies through your employer, if employed.

5. Review your insurance coverage periodically to ensure that coverage stays current.

Insurance

Life insurance

Location of policy

Policy number

Issuer

Issue date

Address

Amount

Phone number

Email

Website

Beneficiaries

Health insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Mortgage insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Insurance (continued)

Home warranty policy

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Automobile insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Automobile insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Insurance (continued)

Long-term care insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Dental insurance

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website

Other insurance ((e.g., disability)

Location of policy

Policy number

Issuer

Address

Issue date

Amount

Phone number

Email

Website



Professional advisors

This list should include a record of advisors and professionals who are responsible for guidance in specific areas of your life—from finance to health care to legal representation.

1. Gather contact information for each of the professionals who provide you and your family with personal, legal, and financial guidance as well as your primary care physician. (There's a section further below for information on additional medical professionals.)

2. As many of these institutions are moving to paperless recordkeeping, be sure to include digital contact information including websites and email addresses.

3. Update this section frequently, as the people responsible for servicing your account can change.

Professional advisors

TIAA advisor

Name

Address

Phone number | Email | Website

TIAA advisor

Name

Address

Phone number | Email | Website

Attorney

Name

Address

Phone number | Email | Website

Primary care physician

Name

Address

Phone number | Email | Website

Professional advisors (continued)

Other

Name and role

Address

Phone number

Email

Website

Other

Name and role

Address

Phone number

Email

Website

Other

Name and role

Address

Phone number

Email

Website

Other

Name and role

Address

Phone number

Email

Website

Other

Name and role

Address

Phone number

Email

Website



Important financial documents

Use this section to record the institutions you use to conduct your short- and long-term financial transactions—from banking and credit information to tax and loan contacts.

1. Work in conjunction with your financial service providers to gather updated contact information and customer service channels.
2. Ask for copies of any documents that outline the services each financial institution provides for you and your family, and all fee agreements, if applicable.
3. Keep a record for each financial account you possess, including bank accounts, credit cards, loans, and tax information.
4. Review your beneficiary designations for life insurance and retirement accounts, and any transfer on death (TOD) or payable on death (POD) designations on nonretirement accounts; obtain verification from the institution.

Your financial assets

Annuities

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Pension

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Retirement account

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Retirement account

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Your financial assets (continued)

Retirement account

Financial institution

Account number

Address

Account type

Phone number

Email

Website

IRA

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Education savings accounts

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Your financial assets (continued)

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Banking

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Safe deposit box

Financial institution

Box number

Address

Phone number

Key location

Other financial information

Mortgage

Lending institution

Loan number

Address

Phone number

Email

Website

Line of credit

Financial institution

Loan number

Address

Phone number

Email

Website

Credit card

Financial institution

Loan number

Address

Phone number

Email

Website

Credit card

Financial institution

Loan number

Address

Phone number

Email

Website

Other financial information (continued)

Automobile loan

Lending institution

Loan number

Address

Phone number

Email

Website

Automobile loan

Financial institution

Loan number

Address

Phone number

Email

Website

Taxes

Location of last year's tax documents

Location of this year's tax documents

Location(s) of income forms (1099, W-2, etc.)

Location(s) of deductible receipts

Other

Financial institution

Loan number

Address

Phone number

Email

Website

Other financial information (continued)

Other

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Other

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Other

Financial institution

Account number

Address

Account type

Phone number

Email

Website

Other

Financial institution

Account number

Address

Account type

Phone number

Email

Website



Important legal documents

Use this section to document items such as your marriage certificate, will, trusts, and power(s) of attorney, as well as property documentation, including automotive and home titles.

1. List the location and date (if relevant) of your last will and testament, trusts, military service record (especially DD-214 discharge form), marriage and/or divorce documents, and home and property information.
2. Make paper or digital copies of your original documents and store them in a safe place; you may need them for reference at a later date.
3. Keep this list and any applicable documents up-to-date and accessible to replace lost documents promptly.
4. If interested in a digital safe, contact your TIAA advisor about TIAA Safe Estate.

Important legal documents

Will and/or revocable trust

Location of will/trust

Legal counsel for will/trust

Executor/Administrator

Name

Address

Phone number

Email

Website

Powers of attorney

General power of attorney

Medical power of attorney

Name(s) of agent(s)

Address

Phone number

Email

Marriage/Civil union/De facto (common-law) relationship

Location of documents

Date of event

Legal counsel for contract

Name

Address

Phone number

Email

Website

Important legal documents (continued)

Separation/Divorce decree

Location of documents

Date of event

Legal counsel for contract

Name

Address

Phone number

Email

Website

Widow/Widower

Location of spouse's death certificate

Date of death

Birth certificate/Certificate of birth abroad

Location of birth certificate

Date and location of birth

Location of spouse's birth certificate

Date and location of birth

Location of child's birth certificate

Date and location of birth

Location of child's birth certificate

Date and location of birth

Location of child's birth certificate

Date and location of birth

Location of child's birth certificate

Date and location of birth

Important legal documents (continued)

Adoption decree

Location of adoption decree

Date and location of birth

Passport and visa

Location of passport

Country and date of issue

Expiration date

Location of visa

Country and date of issue

Expiration date

Military documents/VA discharge papers

Location

Date of service

Date of discharge

Home documents

Location

Mortgage closing paperwork

Location

Plot maps and boundary lines

Location

Important legal documents (continued)

Boats, ATV and other vehicles

Title location

Make

License number

Model

Automobile

Title location

Make

License number

Model

Other

Location of documents

Date of event

Legal counsel

Name

Address

Phone number

Email

Website

Other

Location of documents

Date of event

Legal counsel

Name

Address

Phone number

Email

Website



Home and asset inventory

This section outlines your physical possessions and will help prepare you should you experience a natural disaster—such as fire, tornado, or hurricane—or should you be the victim of theft or vandalism.

1. Work in conjunction with your home insurance provider to complete a full list of items that may need replacing in the event of an emergency.
2. Make a video of each item you list and store the videos in a safe place; the videos will be of invaluable use to replace any items in the event of an emergency.
3. For your most valuable items, make and file copies of receipts and proofs of purchase.
4. If you keep your valuables and important documents in a vault at home or in a safety deposit box, ensure someone you trust knows where it is and has the combination/key and access.

Inventory of valuables

Jewelry, art, collectibles, and furniture

Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost

Appliances, electronics, and large purchases

Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties

Other

Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties



Helpful information

Use this section to record information about professionals and institutions that provide home services, such as utilities and any additional providers.

1. Ask for copies of all documents that outline the services of each provider.
2. As many services are moving to paperless recordkeeping, include digital contact information such as websites and email addresses.
3. Update this section frequently.

Helpful information

Utilities and services

Gas company

Account number

Website

Phone number

Method of payment

Electric company

Account number

Website

Phone number

Method of payment

Water company

Account number

Website

Phone number

Method of payment

Phone company

Account number

Website

Phone number

Method of payment

Helpful information (continued)

Utilities and services (continued)

Waste management

Account number

Website

Phone number

Method of payment

Cable/Satellite company

Account number

Website

Phone number

Method of payment

Internet provider

Account number

Website

Phone number

Method of payment

Helpful information (continued)

Other utilities and services (for example, home security company, pest control, house cleaning service, landscaper/yard maintenance, snow removal, pool maintenance)

Other

Account number

Website

Phone number

Method of payment

Other

Account number

Website

Phone number

Method of payment

Other

Account number

Website

Phone number

Method of payment

Other

Account number

Website

Phone number

Method of payment

Helpful information (continued)

Other utilities and services (for example, home security company, pest control, house cleaning service, landscaper/yard maintenance, snow removal, pool maintenance) (continued)

Other

Account number

Website

Phone number

Method of payment

Other

Account number

Website

Phone number

Method of payment

Other

Account number

Website

Phone number

Method of payment

Helpful information (continued)

Medical professionals

Physician

Account number

Website

Phone number

Dentist

Account number

Website

Phone number

Eye care professional

Account number

Website

Phone number

Other medical professional

Account number

Website

Phone number

Other medical professional

Account number

Website

Phone number

Other medical professional

Account number

Website

Phone number

Helpful information (continued)

Other service providers

Name

Account number

Website

Phone number

Name

Account number

Website

Phone number

Name

Account number

Website

Phone number

Name

Account number

Website

Phone number

Name

Account number

Website

Phone number

Name

Account number

Website

Phone number

Prepare for whatever life has in store.

Your personal assets and inventory organizer is a great first step. Complete it today as a valuable aid for yourself and your family.

TIAA Wealth Management

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