



Beneficiary Planner

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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*, your gift from Colonial Penn Life Insurance Company, is 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 from Colonial Penn.

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

Name _____ Address _____

City _____ State _____ 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 _____



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