



Maryland Retired School Personnel Association  
 8379 Piney Orchard Parkway, Suite A  
 Odenton, MD 21113  
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[www.mrspa.org](http://www.mrspa.org) [mrspa@mrspa.org](mailto:mrspa@mrspa.org)

**For Your Information**

**A Record of Contact, Financial, and Legal Information for  
 Planning with Your Family or Estate Executor During Retirement**

**Name:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_

**Emergency Contact:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**INFORMATION ABOUT YOU (FULL NAME)**

Organ Donor	Social Security #	Date of Birth	Place of Birth
Father's Name - Place of Birth		Mother's Maiden Name - Place of Birth	

**INFORMATION ABOUT YOUR SPOUSE**  Living  Deceased

Organ Donor	Social Security #	Date of Birth	Place of Birth
Father's Name - Place of Birth		Mother's Maiden Name - Place of Birth	

**INFORMATION ABOUT EACH OTHER**

Date of Marriage	Place of Marriage	Location of Marriage Certificate
Your Life Insurance Company and Policy #		Agent/Phone Number
Your Spouse's Life Insurance Co. and Policy #		Agent/Phone Number

**INFORMATION ABOUT YOUR CHILDREN**

Full Name	Address	Phone Number

## ADDITIONAL INFORMATION

Bank Name and Account Numbers	
Safe Deposit Box & Key & Who Has Access?	
Health Insurance and Policy Number	
Disability Insurance	
List Credit Cards: (Indicate if Balance is Paid Upon Death by Insurance)	
Location of Will	EXECUTOR:
Immigration/Naturalization Papers	
Location of Birth and Death Certificates	
Prepaid Funeral Arrangements	
Location of Burial Plot	
Location of Military Records	
Location of Medical Records	
Location of Advanced Directives/MOLST	

## ADVISORS

Advisor	Name	Address	Phone
Primary Doctor			
Specialist Doctor			
Lawyer			
Power of Attorney			
Accountant			
Banker			
Stockbroker			
Financial Advisor			

## ASSETS

ASSETS	DESCRIPTION/ LOCATION OF RECORDS	ID NUMBER	MORTGAGE or LEIN		VALUE
			YES	NO	
House #1					
House #2					
Auto #1					
Auto #2					
Boat/RV					
Stocks					
Mutual Funds					
Bonds					
Trusts					
CD's					
Insurance					
Insurance					
Retirement Plan					
IRA's/TSA's					
Other/Collectibles					

### Items to Keep in Your Safe Deposit Box

**Original of:**

**Powers of Attorney**  
**Advance Directives**  
**Social Security Cards**  
**Birth Certificates**  
**Marriage Certificates**  
**Death Certificates**  
**Mortgage Information**  
**Passports**

**Military Discharge Papers**  
**Car Titles**  
**All Insurance Policies**  
**Savings Bonds**  
**Stock Certificates**  
**Last Will and Testament**  
**Password List**  
**Jewelry, Heirlooms, Collectibles**

## MONTHLY/QUARTERLY EXPENSES

NAME	ADDRESS	PHONE NUMBER	AMOUNT PER MONTH/QUARTER
Home Care Agency			
Gas & Electric			
Phone/Cell			
Water/Sewer			
Cable			
Trash/Recycling Service			
Cleaning Service			
Yard Care or Snow Removal			
Newspaper/Magazine			
House/Apt. Insurance			
Auto Insurance			
Life Insurance			
Other Insurance			

**Remember to have next of kin or your executor notify the Maryland State Retirement and Pension System at 800-492-5909 and MRSPA at 410-551-1517 in the event of your death.**

**For more information on planning during your retirement years contact your financial advisor or search the AARP website at [www.aarp.org/benefits](http://www.aarp.org/benefits). Look for the Family Caregiving section of the Member Benefits page.**