



Maryland Retired School Personnel Association
 8379 Piney Orchard Parkway, Suite A
 Odenton, MD 21113
 410-551-1517 877-625-6782
www.mrspa.org 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 410-551-517 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. Look for the Family Caregiving section of the Member Benefits page.