

Family Coverage Organizer

United Trust Life - Keep this document somewhere safe

A blank form to fill out BY HAND. So your family knows what policies you have and who to call. Do not mail this to us or anyone - store it securely (a safe, a fireproof box). Tip: do NOT write full Social Security or account numbers; instead note WHERE those documents are kept.

ABOUT

NAME

DATE COMPLETED

KEY CONTACTS (who your family should call first)

INSURANCE AGENT

AGENT PHONE / EMAIL

ATTORNEY (WILL / ESTATE)

ATTORNEY PHONE

FINANCIAL ADVISOR / BANK

EMPLOYER OR UNION BENEFITS

EXECUTOR / TRUSTED PERSON

THEIR PHONE

INSURANCE POLICIES

TYPE

COMPANY

CONTACT / PHONE

BENEFICIARY

WHERE KEPT

WHERE IMPORTANT DOCUMENTS ARE KEPT

NOTES (not a legal will - see an attorney for that)