

JUST IN CASE BOOK

Compiled by
Walter L. Russell



Russell
& Company



Russell
& Company

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New Albany, OH 43054
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WE ORCHESTRATE A TEAM OF EXPERTS IN ALL AREAS OF PERSONAL FINANCE TO HELP OUR CLIENTS:

We get clients entire financial house in order and we will work to keep it that way forever.

Clients will enjoy a high level of confidence that they will achieve their goals.

Align all financial decisions with their most important goals and their most deeply held values.

FINANCIAL PLANNING PROCESS

STEP 01

Cash

12 month Liquid net worth
Debt Reduction
Budget Analysis

STEP 02

Protection

Life Insurance
Group Benefits
Long Term Care
Disability Insurance

STEP 03

Estate/Tax Management

Wills, Trust
Probate
Avoidance
Taxable, Tax
Deferred, and
Tax Free

STEP 04

Asset Management

Retirement
Planning
Dividend and
Interest
Conservative
vs. Growth
Investments



WALTER RUSSELL

TRUSTED ADVISOR
OVER 20 YEARS EXPERIENCE

“As your Trusted Advisor I can act as your financial planner and money manager while working with your Tax Advisor, Attorney, and Insurance Agent to make sure all aspects of your financial future are working together.”

Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Russell & Associates is not affiliated with Kestra IS or Kestra AS.

JUST IN CASE BOOK

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PERSONAL INFORMATION

(you, spouse, children, parents)

Name	Current address	
Home phone	Work phone	Cell phone
All email addresses		
Office address	Office contact name and phone	
Birthdate	Birthplace	Anniversary
SSN	DL #	

Name	Current address	
Home phone	Work phone	Cell phone
All email addresses		
Office address	Office contact name and phone	
Birthdate	Birthplace	Anniversary
SSN	DL #	

Name	Current address	
Home phone	Work phone	Cell phone
All email addresses		
Office address	Office contact name and phone	
Birthdate	Birthplace	Anniversary
SSN	DL #	

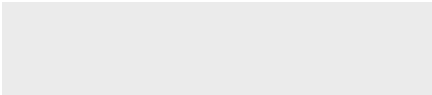
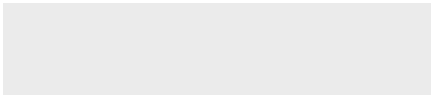
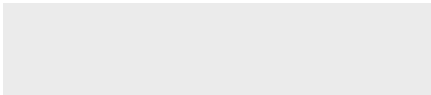
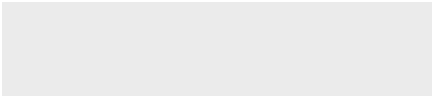
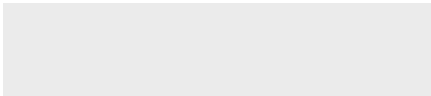
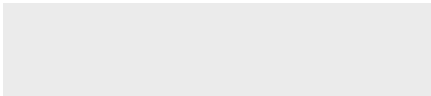
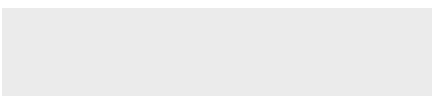
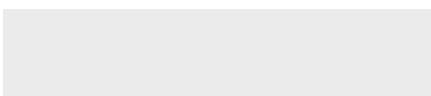
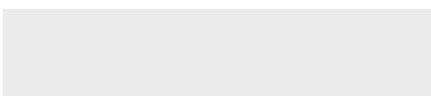
Name	Current address	
Home phone	Work phone	Cell phone
All email addresses		
Office address	Office contact name and phone	
Birthdate	Birthplace	Anniversary
SSN	DL #	

EMERGENCY PLAN

Meeting location 1

Meeting location 2

Emergency grab list

Water shutdown location 	Gas shutdown location 	Fire extinguisher 
Smoke detectors 	Burgular alarm Code 	Alarm company contact 
Emergency water location 	Emergency food location 	Emergency cash location 

Emergency contact name

Relationship

Phone number(s)

Address

Emergency contact name

Relationship

Phone number(s)

Address

Emergency contact name

Relationship

Phone number(s)

Address

PASSWORDS AND LOGINS

Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password
Website	ID	Password

DATA BACKUP PLANS

(services, thumb drives, external hard drives, DVDs, etc.)

Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				
Type	Description	ID/Login (if needed)	Password	Location
How to restore				

GROUPS AND ORGANIZATIONS

(clubs, professional organizations, civic groups, etc.)

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

Groups name		Contact name	Contact phone/email	
[]		[]	[]	
Membership level	Awards received	Member since	Membership number	
[]	[]	[]	[]	

BANK ACCOUNTS

Type	Institution	Account number
Owners of account	Institution contact info	
Statements sent to (physical address or email address)	Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account	ATM PIN

Type	Institution	Account number
Owners of account	Institution contact info	
Statements sent to (physical address or email address)	Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account	ATM PIN

Type	Institution	Account number
Owners of account	Institution contact info	
Statements sent to (physical address or email address)	Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account	ATM PIN

Type	Institution	Account number
Owners of account	Institution contact info	
Statements sent to (physical address or email address)	Automated payments from	
Location of checks and used checkbooks	ATM and debit cards for account	ATM PIN

ACCOUNT NUMBERS

(Utilities, Mortgage, Cable, Lawn, Cell Phone, Cleaning, etc.)

Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Account number	Company	Phone	Website
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PREVIOUS ADDRESSES

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Street		City	
[Redacted]		[Redacted]	
State	Zip	Dates Lived There	Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]

LIFE INSURANCE POLICIES

(includes AD&D and LTD)

Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	
Who	Policy holder	Policy number	Policy amount
Policy holder contact information		Beneficiaries	

HEALTH INSURANCE POLICIES

(includes Dental and Prescription Drugs)

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

Who covered	Insurer	Policy number	Policy contact information	
Co Pay amount	Website		Cost/month	Network

CAR INSURANCE

Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage		Deductibles		\$ deductions

Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage		Deductibles		\$ deductions

Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage		Deductibles		\$ deductions

Insurer	Drivers covered	Car make/model	Policy number	Contact information
Coverage		Deductibles		\$ deductions

HOMEOWNER/RENTERS INSURANCE

Insurer

Location insured

Policy number

Contact information

Deductible

Items explicitly covered

Policy notes

Insurer

Location insured

Policy number

Contact information

Deductible

Items explicitly covered

Policy notes

MEDICAL HISTORY

(Yourself and Immediate Family), Including Allergies

Who	Approx date	Condition/illness	Notes/results

PRESCRIPTION MEDICATION

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

Who	Medication	Dosage	Prescribing Doctor

EXTENDED FAMILY MEDICAL HISTORY

Who	Relationship	Illness/disease	Details

LONG TERM HEALTH CARE DIRECTIONS

(Self and Immediate Family)

Who	Situation	Care desired

ORGANS, TISSUE, AND BODY DONATION

(Self and Immediate Family)

Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate
Who	Body part(s)	Donate/do not donate

FINAL ARRANGEMENTS

Who	Date updated	Time on life support?	DNR?	Institution to handle arrangements
Casket/container type	Open/closed?	Embalmed?	Burial/cremation?	Where interred?
Who performs ceremony?		Pallbearers?		
Grave/Memorial marker details		Ceremony speakers	Special music, notes, food, or drink?	
Where flowers/donations should be sent			Location of will	
Other notes about final arrangements				
<div style="border: 1px solid black; height: 150px;"></div>				

Who	Date updated	Time on life support?	DNR?	Institution to handle arrangements
Casket/container type	Open/closed?	Embalmed?	Burial/cremation?	Where interred?
Who performs ceremony?		Pallbearers?		
Grave/Memorial marker details		Ceremony speakers	Special music, notes, food, or drink?	
Where flowers/donations should be sent			Location of will	
Other notes about final arrangements				
<div style="border: 1px solid black; height: 150px;"></div>				

EULOGY NOTES

(milestones of your life to help with any eulogy)

Who

Notes

Who

Notes

PERSONAL LETTERS

Place any letters to loved ones in a pouch or page protector here.

These letters are typically opened upon the death of the writer.
Be sure to update these letters on a regular basis.

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

Author	Date of letter	Who is the letter for?

ESTATE PLANS AND GIFTS

Who	Will location	Executor of will	Trust location	Trustees
Who	Will location	Executor of will	Trust location	Trustees

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

Item	Who should receive this?	
What circumstances (death of self, spouse, or both)	Estimated Value	Date

OTHER CONTACTS IN CASE OF DEATH

COMPANY BENEFITS DEPARTMENT

Company	HR phone number	Employee number	Notes

INSURANCE COMPANY

Company	Contact number	Policy number	Agent name	Notes

INSURANCE COMPANY

Company	Contact number	Policy number	Agent name	Notes

INSURANCE COMPANY

Company	Contact number	Policy number	Agent name	Notes

SOCIAL SECURITY ADMINISTRATION

SSN	Contact number	Notes
	800-772-1213	

VETERANS ADMINISTRATION

SSN	Contact number	Notes
	800-827-1000	

PENSION PLAN

Company	Contact number	Account number	Notes

PENSION PLAN

Company	Contact number	Account number	Notes

PENSION PLAN

Company	Contact number	Account number	Notes

CREDIT BUREAUS (VERIFY ADDRESSES) (SEND COPIES OF DEATH CERTIFICATES)

Equifax	Experian	TransUnion
PO Box 105069, Atlanta, GA 30348	PO Box 9530, Allen, TX 75013	PO Box 6790, Fullerton, CA 92634

FUNERAL RELATED EXPENSES AND RECEIPTS

Keep all funeral related expenses and receipts in a pouch or page protector on this page.

INVESTMENTS

(including mutual funds, annuities, and stocks)

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

Type	Name	Account number		
Contact info	Location of information		Value	Date

OTHER ASSETS

(Savings bonds, stock options, etc.)

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

RETIREMENT PLANS

(401k, pensions, IRAs, etc.)

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

Type	Name	Account number		
Contact info		Location of information	Value	Date

PRIVATE BUSINESS

Type	Name of company	Position in company	SSN/FEIN		
Partner name		Partner contact info			
Partner name		Partner contact info			
Name of bank		Bank account number	Credit card number (s)		
PIN	Bank url	Bank website ID	Bank website password		
Domain name reg	Account ID	Password	Webhost	Account ID	Password
Email url	Email address	PW	Other website	ID	Password
Other website	ID	PW	Other website	ID	Password
Other website	ID	PW	Other website	ID	Password

NOTES

REAL ESTATE

Location	Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info	
Property taxes	Location of paperwork		
Notes			

Location	Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info	
Property taxes	Location of paperwork		
Notes			

Location	Type	Date	Est Value
Mortgage holder	Mortgage acct num	Lender contact info	
Property taxes	Location of paperwork		
Notes			

NOTES

SAFES, STORAGE UNITS, PO BOXES, SAFETY DEPOSIT BOXES, ETC.

Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed
Type	Location	Combination	Key location
What is stored within?			Date Closed

VALUABLES INVENTORY

(go room by room and look for things of value)

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

Item	Type	Model number	Color	Serial Number
Description		Location	Date	Est Value

AUTOMOBILES, MOTORCYCLES, BOATS, RVs, AND OTHER VEHICLES

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer	Policy number	Odometer/hours	
Notes					Date

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer	Policy number	Odometer/hours	
Notes					Date

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer	Policy number	Odometer/hours	
Notes					Date

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer	Policy number	Odometer/hours	
Notes					Date

Type	Year	Make	Model	Color	VIN
License plate #	Location of spare key	Insurer	Policy number	Odometer/hours	
Notes					Date

TAX ISSUES AND RECORDS

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

Tax Year	Location of forms			Name of CPA		CPA contact information
Federal tax owed	State tax owed	City tax owed	Federal tax paid/ref	State tax paid/ref	City tax paid/ref	

LOAN OBLIGATIONS

Type	Loaning institution			Contact info	Paid off and date?	
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date	

Type	Loaning institution			Contact info	Paid off and date?	
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date	

Type	Loaning institution			Contact info	Paid off and date?	
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date	

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Account number	Originating date	Final payment date	Loan amount	Loan balance	Date	

Type	Loaning institution			Contact info	Paid off and date?	
Account number	Originating date	Final payment date	Loan amount	Loan balance	Date	

CREDIT CARDS

Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password	Outside US customer service phone #		
Interest rate	Balance	Credit limit	Date	Closed?	Date closed

Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password	Outside US customer service phone #		
Interest rate	Balance	Credit limit	Date	Closed?	Date closed

Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password	Outside US customer service phone #		
Interest rate	Balance	Credit limit	Date	Closed?	Date closed

Type (Visa, MC, etc.)	Brand	Issuing bank	Name on card		
Card number		Exp date	Security code	Cust service phone	
Card website	Website ID	Website password	Outside US customer service phone #		
Interest rate	Balance	Credit limit	Date	Closed?	Date closed

OTHER DEBTS

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debt holder		Holder contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

DEBTS AND OBLIGATIONS OWED TO YOU

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					

Type	Debtor		Debtor contact info		
Originating date	Final payment date	Original debt amt	Current balance	Date	Paid off (and date)?
Notes					



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