

# Personal Information Center (PIC)

## BANK ACCOUNTS

Here are some account statements to include in your PIC:

- Checking / Share Draft / NOW
- Savings / Share
- Cash, amounts and locations (savings deposit box, emergency kit, coffee can in the back yard)
- CDs
- Money market accounts
- Revolving lines of credit attached to your checking
- Savings bonds
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Account number, if not already present
- ✓ Contact information (phone, website, address)
- ✓ Who is on the account, if not shown
- ✓ Who is the beneficiary
- ✓ How you receive your statement (mail or email/electronic)
- ✓ How you access your account (check, ATM, phone, internet)
- ✓ Intent for the account (vacation, 6-month emergency fund, etc.)

**KEEP usernames, passwords, and your PIC SECURE**

# Personal Information Center (PIC)

## BILLS

Here are some account statements to include in your PIC:

- Auto Registration
- Home Maintenance – Pest Protection / Security / Lawn Care
- Insurance bills/payments (copies of the policies will go under the Insurance tab)
  - Auto
  - Life
  - Dental
  - Renters
  - Homeowners
  - Medical
- Loans
- Magazine Subscriptions (not as important, but why not)
- Mortgage / Rent
- Property taxes
- Utilities
  - Cable/Internet
  - Sewer
  - Electricity
  - Trash
  - Gas
  - Water
  - Phone (Cell, Landline)
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Account number, if not already present
- ✓ Contact information (phone, website, address)
- ✓ Who is on the account, if not shown
- ✓ How you receive your statement (mail or email/electronic)
- ✓ How you pay the bill (check, automatic payment, on-line)
- ✓ How often and when the bill is due (monthly on the 5<sup>th</sup>, every 3 months, annually)

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## CREDIT CARDS

Here are some account statements to include in your PIC:

- American Express
- Discover
- Visa / MasterCard
- Department Stores (Sears, Macy's, etc.)
- Gas
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- ✓ Account number, if not already present
- ✓ Contact information (phone, website, address)
- ✓ Who is on the account, if not shown
- ✓ How you receive your statement (mail or email/electronic)
- ✓ How you pay the bill (check, automatic payment, on-line)
- ✓ How often and when the bill is due (monthly on the 5<sup>th</sup>, etc.)
- ✓ Intent for the account (business, travel, gas)

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## DIGITAL ACCOUNTS

Here are service and product accounts to list:

- Data storage (Dropbox, Box, Google Drive, iCloud, OneDrive, backup applications, computers, external hard drives, etc.)
- Devices (computers, laptops, phone, tablet, etc.). You may use a password to lock the device.
- Email (Gmail, Yahoo, Outlook etc.)
- Entertainment (Netflix, Acorn, Vudu, Hulu, Amazon, CBS, NBC, ABC, etc.)
- Home inventory (spreadsheet on your computer, an app on your phone, or an account on the web, etc.). The paper version goes under the **Property** tab.
- Photo storage and organizing accounts (Google, iCloud, Costco, Forever, Dropbox, etc.)
- Shopping accounts (Amazon, eBay, Etsy, etc.)
- Social Media (Facebook, Twitter, Snapchat, Goodreads, Instagram, Pinterest, Google+, etc.) Note if your credit card or bank account is attached.
- Websites, blogs, and domains you own

Additional asset accounts to list:

- Books you've published (CreateSpace, KDP, iTunes, Barnes & Noble Nook, Kobo, Smashwords, Amazon Author Page, Ingram, publishers, agent, etc.).
- eCommerce sites for your products, services, creations, and more (eBay, Etsy, auction sites, online art galleries, classified ad sites such as Craigslist, etc.).
- Income producing accounts that provide passive income (affiliates programs, YouTube, online training sites, etc.).
- Merchant accounts (PayPal, QuickBooks, Square, etc.).
- Social Media (Facebook, Snapchat, Instagram, etc.).

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# Personal Information Center (PIC)

## DIGITAL ACCOUNTS

Include the following information for each account on your list:

- ✓ Name of Account
- ✓ Website URL
- ✓ Payment information. Include how often you're charged, how you pay (credit card, bank account, invoiced, or automatic debit, etc.)
- ✓ If you access the account from an app on your phone, tablet or computer, note which device and app name.
- ✓ Use or reason for the account, i.e. personal email, social media page for business, emergency fund, receive payment from..., etc.
- ✓ Additional individuals on the account or with account access.
- ✓ If the asset account automatically or manually transfer money to your bank account.

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# Personal Information Center (PIC)

## INSURANCE

Here are some policy statements to include in your PIC:

- Auto
- Home / Renters
- Medical
- Dental
- Eye
- Accident
- Disability
- Life
- Pet medical
- 
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Account number, if not already present
- ✓ Contact information (phone, website, address)
- ✓ Who is on the account, if not shown
- ✓ Who is the beneficiary
- ✓ How you receive your statement (mail or email/electronic)
- ✓ How you pay the bill (check, automatic payment, on-line)
- ✓ How often and when the bill is due (monthly on the 5th, every 3 months, annually)

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# Personal Information Center (PIC)

## INVESTMENTS

Here are some account statements to include in your PIC:

- 401(k)s
- Bonds
- Brokerage Accounts
- Businesses
- DRIPs
- IRAs
- Partnerships
- Retirement
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Account number, if not already present
- ✓ Contact information (phone, website, address)
- ✓ Who is on the account, if not shown
- ✓ Who is the beneficiary
- ✓ How you receive your statement (mail or email/electronic)
- ✓ How you access your account (check, ATM, phone, internet)
- ✓ Intent for the account (vacation, 6-month emergency fund, retirement)

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# Personal Information Center (PIC)

## MEDICAL

You will want to have a list of your doctors, prescriptions and contact information but instead of writing all that down, add the reports that your insurance sends or even the doctor and facility bill statements.

- Primary care
- Specialists
- Dental
- Eye
- Home care
- Meals assistance
- Pharmacy — receipts & prescription information
- Medical equipment — receipts, maintenance or service agreements, operating instructions, repair and replacement information
- Allergies or health issues
- Recurring appointments (dialysis, oncology treatment, therapy, etc.)
- Vaccination records
  
- Date of last Tetanus shot** \_\_\_\_\_

3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Contact information (name, phone, website, address)
- ✓ Specific health issues
- ✓ Who is authorized on the account to give and receive information

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# Personal Information Center (PIC)

## PETS

Here are some statements to include in your PIC:

- Latest vet bill with vaccinations
- Health needs — receipts, vet bills, etc.
  - Allergies
  - Dietary needs
  - Medication
  - Treatments
- Microchip certificate
- Receipt from the pet recovery register
- Receipt from your pet sitter or day-care
- Photos of your pets (or place in PHOTO tab)
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Vet contact #
- ✓ Pet sitter / day care contact #
- ✓ Who is authorized to make decisions at the vet's office

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# Personal Information Center (PIC)

## PROPERTY

Here are some things to include in your PIC:

- Property inventory list (aka home inventory, Step #26)
- Receipts for art or other big-ticket items
- Vehicle registrations (a copy of course or an old one)
- Other documentation
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3-hole punch each statement and insert it in this section. Highlight or write in information that would be useful. Such as:

- ✓ Purchase dates
- ✓ Other details

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# Personal Information Center (PIC)

## SAFE DEPOSIT BOX

Here are some things to put in your safe-deposit box. Add copies to your PIC:

- Birth certificates
- Death certificates
- Deeds
- Digital accounts list (Step #12)
- Divorce certificates
- Irreplaceable memorabilia
- Life insurance policies
- Passports
- Property inventory (include photos, video, certificate of ownership, etc.)
- Retirement Account Information
- Social Security cards
- Wedding certificates

List anything else you have put in your safe-deposit box

- |                                |                                |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

Location of safe deposit box: \_\_\_\_\_

Location of safe deposit box KEY: \_\_\_\_\_

Box #: \_\_\_\_\_

Signatories: \_\_\_\_\_

Security requirements: \_\_\_\_\_

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# Personal Information Center (PIC)

## WILLS & DIRECTIVES

Here are some documents to include in your PIC:

- |  |                             |
|--|-----------------------------|
| <input type="checkbox"/> Last Will and Testament       | Location of original: _____ |
| <input type="checkbox"/> Health Care Advance Directive | Location of original: _____ |
| <input type="checkbox"/> Power-of-Attorney             | Location of original: _____ |
| <input type="checkbox"/> Trusts                        | Location of original: _____ |
| <input type="checkbox"/>                               | Location of original: _____ |
| <input type="checkbox"/>                               | Location of original: _____ |

3-hole punch each copy and insert it in this section.

The **original copies should be kept in a safe place** which may or may not be this PIC. A safe deposit box is not a good place for wills or directives as your executor may not be able to access it unless they are signatories on the box.

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**CONGRATULATIONS!**

**You've completed  
your PIC.**