

Key Records Inventory

Presented by [Kris Maksimovich, AIF®, CRPC®, CRC®](#)



Family Information

Name	Date of Birth	SSN	Health Information (blood type, allergies, illnesses, medications)

Pet Information

Name	Description	Vet Contact Information	Health Information (illnesses, allergies, medications)

Essential Contacts

	Name	Phone Number	Other Information (email, nature of relationship, etc.)
Family Member			
Family Member			
Family Member			
Family Member			
Friend			
Friend			
Friend			
Babysitter			
Daycare Provider			
Children's School			
Power of Attorney (financial)			
Power of Attorney (health care)			
Primary Care Physician			
Other Physician			
Pediatrician			
Attorney			
Financial Advisor			
Financial Advisor			
Banker			
Mortgage Broker			
Insurance Agent			
Insurance Agent			
Realtor			

Brokerage Firm			
Brokerage Firm			
Bank			
Telephone Provider			
Cell Phone Provider			
Cable Provider			
Gas Company			
Electric Company			
Internet Provider			
Other			
Other			
Other			
Other			
Other			
Other			
Other			
Other			

Important Numbers

	Number	Other Information
Alarm System Code		
Garage Door Code		
Gate Code		
Safe Code		
ATM PIN		
Cell Phone Unlock Code		
Other		
Other		

Login Information

Website/Device	Username	Password	What Can Be Accessed?
			Home Computer
			Work Computer
			Personal Email
			Work Email
			Bank Accounts
			Credit Cards
			Mortgage
			Student Loans
			Retirement Plan
			Online File Storage

Insurance Policies

Type	Insured	Policy Number	Contact Information
Health Insurance	Self		
Health Insurance	Spouse		
Health Insurance	Child		
Health Insurance	Child		
Auto Insurance			
Auto Insurance			
Long-Term Care	Self		
Long-Term Care	Spouse		
Life Insurance	Self		
Life Insurance	Spouse		

Account Numbers (bank, brokerage, annuity, and retirement plan accounts)

Account Type	Location	Account Number

Safety Deposit Boxes

Registered in the Name Of	Location	Box Number	Location of Keys	Authorized Signers

Key Document Locations

Document Name	Issued For	Location
Birth Certificate		
Birth Certificate		
Birth Certificate		
Birth Certificate		
Social Security Card		
Social Security Card		
Social Security Card		
Social Security Card		
Passport		
Passport		
Passport		
Passport		
Death Certificate		
Death Certificate		
Death Certificate		
Preuptial Agreement		
Marriage Certificate		
Divorce Papers		
Adoption Papers		
Guardianship Papers		
Burial Instructions		
Will		
Will		
Trust		
Trust		
Power of Attorney		
Power of Attorney		
Health Care Directive		
Health Care Directive		
Home Deed		
Motor Vehicle Title		
Motor Vehicle Title		
Rental Agreements		

Appraisal and Inventory of Valuable Items		
Tax Returns		
Brokerage and Banking Account Statements		
Stock Certificates		
Savings Bonds		
Company Benefit Paperwork		
Business Documents		
Other		
Other		
Other		

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Kris Maksimovich is a financial advisor located at Global Wealth Advisors 4400 State Hwy 121, Ste. 200, Lewisville, TX 75056. He offers securities and advisory services as an Investment Adviser Representative of Commonwealth Financial Network®, Member [FINRA/SIPC](#), a Registered Investment Adviser. Financial planning services offered through Global Wealth Advisors are separate and unrelated to Commonwealth. He can be reached at (972) 930-1238 or at info@qwadvisors.net.

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