

Record of Important Documents

Name _____

Date _____

Personal

Indicate the location of each document.

Birth Certificate _____

Deed/Title to property _____

Passport _____

Divorce Papers _____

Marriage Certificate _____

Automobile Title(s) _____

Social Security Card _____

Military Service Record(s) _____

Financial

Indicate the bank name, address, telephone number, and account number for each account.

Bank Account (Checking)

Bank Account (Saving)

Mortgage

Safe Deposit Box/Box Number/Keys

Insurance

Indicate the insurance company name, address, telephone number, and policy number for each policy.

Life Insurance

Health Insurance

Automobile Insurance

Property Insurance

Legal

Indicate the location of each document and, if applicable, an authorized individual.

Will _____

Trust _____

Power of Attorney _____

Other

TRS/ERS/RSA-1 Designation of Beneficiary Forms _____

Keys and Combinations _____

Social Media Accounts _____

E-mail Address (1) _____ E-mail Address (2) _____



Compliments of the Retirement Systems of Alabama – Field Services Division
201 S Union Street
Montgomery, AL 36104
(877) 517-0020 or (334) 517-7400
www.rsa-al.gov

Credit Card(s)/Debit Card(s)

Circle Credit or Debit

Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
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Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Credit / Debit Card
Issuer _____
Account No. _____
Expiration Date _____ Security Code: _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Utilities

Electricity

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Water

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Cable / Satellite

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Natural Gas / Propane

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Trash

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Phone / Mobile Phone

Utility Company Name _____
Account No. _____
Payment Address _____
Customer Service Phone () _____
Online Account ID _____
Password _____

Notes or Special Instructions:



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