Downslope
FINANCE Debt, all downhill from here.

FREE PRINTABLE

Household Information Sheet

Where everything is, so the people you trust are never left guessing.

Why this exists. Most households keep their financial life in one person's head. If that person is sick, traveling, or gone, the people left behind start from nothing. This sheet records where things are and who to call. It is not a vault, and it should never become one.

The rules printed on every copy

- Never write passwords, PINs, or security answers on these pages.
- Never write full account numbers or Social Security numbers. The last four digits are enough to identify an account.
- Write where something is and who to call, not how to get into it.
- Keep it somewhere a trusted person can find it, and tell them where.
- Review it once a year, or after a move, a new account, or a change in insurance.

Review record

Date reviewed	Reviewed by	What changed

People to call

Who can help, and what each person knows about.

	Name	Phone or email	Notes
Trusted family member or friend			
Accountant or tax preparer			
Attorney (will, estate)			
Financial advisor			
Insurance agent			
Employer HR or benefits			
Doctor or care contact			
Landlord or mortgage servicer			
Other			
Other			

Accounts

Last four digits only. "How to reach it" means online, app, phone, or branch, never the login itself.

Checking and savings

Bank or credit union	Type	Last 4	Owner or joint	How to reach it	Statements kept

Credit cards and loans

Lender	Type	Last 4	Owner or joint	Due day	Paid from (last 4)

Retirement and investments

Company	Account type	Last 4	Owner	Beneficiary named?	Contact

Bills and automatic payments

The bills that keep the household running, and how each one is paid.

Bill	Company	Due day	Paid from (last 4)	Autopay?	How to change or cancel

Insurance

Where each policy lives and who to call to use it.

Type	Company	Policy (last 4)	Where the policy is kept	Beneficiary	Phone

- ☐ Health
- ☐ Auto
- ☐ Home or renters
- ☐ Life
- ☐ Disability
- ☐ Umbrella
- ☐ Pet
- ☐ Other

Documents and digital life

Where the paper is, and how the digital side can be handled.

	Where it is kept	Notes
Will		
Power of attorney (financial)		
Health care directive		
Birth and marriage certificates		
Passports and IDs		
Property deeds or lease		
Vehicle titles		
Tax returns (last 3 years)		
Safe deposit box (location and who has the key)		
Military, pension, or Social Security records		

Digital accounts

Many password managers and phone platforms offer an emergency access or legacy contact feature. Setting that up is safer than writing anything down.

	Details
Password manager in use (name only)	
Emergency or legacy access set up for	
Phone and computer: who has emergency access	
Email accounts that receive bills	

HOUSEHOLD INFORMATION SHEET

Home, vehicles, and everything else

The details that are easy to forget until someone needs them.

Item	Company or contact	Account (last 4)	Notes

- ☐ Electric
- ☐ Gas
- ☐ Water and trash
- ☐ Internet
- ☐ Phone
- ☐ Vehicle lender
- ☐ Storage unit
- ☐ Subscriptions and memberships

Notes for the people who will use this