

Death is not an easy subject to talk about however it will happen to all of us one day. The purpose of this form is to help you prepare your spouse/loved ones for the many decisions that must be made. Cothran Capital, LLC is always available to assist you and your loved ones in these important decisions. Please feel free to print and fill out this confidential form. We recommend that you update this form at least annually and share it with your spouse/loved ones. Thank you again for putting your trust and confidence in Cothran Capital, LLC!

Confidential Information Form

Family Status			
Your Full Name	Social Security Number		
Spouse/Partner Full Name	Social Security Number		
Child Full Name	Social Security Number		
Child Full Name	Social Security Number		
Child Full Name	Social Security Number		
Residence Address	City	State	Zip
Home Phone	Cell Phone	Email Address	

Insurance, Investments and Bank Information		
Life Insurance Company	Policy Number	Contact Information
Life Insurance Company	Policy Number	Contact Information
Life Insurance Company	Policy Number	Contact Information
Retirement Account	Policy Number	Contact Information
Retirement Account	Policy Number	Contact Information

Investment Account	Policy Number	Contact Information	
Investment Account	Policy Number	Contact Information	
Checking Account Institution Name	Account Number	Phone Number	Password (if online banking)
Savings Account Institution Name	Account Number	Phone Number	Password (if online banking)

Important Documents

Marriage Certificate Location

Military Discharge Papers Location

Deeds or Titles Type and Location

Deeds or Titles Type and Location

Adoption Papers for Children Location

Safety Deposit Box Location, Location of Key, Instructions to Access (Name of Institution and Contact Information)

Mortgage Company (Name and Contact Information)

Will or Trust (Location and Name of Contact Person)

Other Important Information

Attorney Name and Contact Information

Pension Information Current Employer (Name of Company and Human Resources Contact Information)

Pension Information Past Employer (Name of Company and Human Resources Contact Information)

Social Security Benefits? (Contact Information)

Medicare Benefits? (Medicare Number and Contact Information)

Veterans Benefits? (Policy Information and Contact Information)

Financial Advisor

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