



Insurance inventory work sheet

It's especially important to let your children know if you have life insurance policies that they would benefit from in the event of your death. That way they can take steps to make sure it stays in force if necessary.

Use this work sheet to summarize insurance information for the friends and family members who will take care of your affairs in case of death or disability.

Life insurance

Indicate whether the policy is through work or an individual policy.

If through work provide employer name:

Address:

Contact name and phone number:

Owner of policy:

Insurance company:

Customer service phone number:

Policy number:

Cash value:

Face amount:

Beneficiary:

Document location:

Disability insurance

Indicate whether the policy is through work or an individual policy.

If through work provide employer name:

Address:

Contact name and phone number:

Insurance company:

Customer service phone number:

Member or policy number:

Document location:

Health insurance

Indicate whether the policy is through work or an individual policy.

If through work provide employer name:

Address:

Contact name and phone number:

Insurance company:

Address:

Customer service phone number:

Plan name:

Plan type:

Group / policy number:

Individual(s) covered by this policy:

Policy location:

Homeowner's insurance

Insurance company:

Customer service number:

Policy number:

Coverage:

Policy location:

Long-term care insurance

Insurance company:

Address:

Customer service phone number:

Policy number:

Date purchased:

How often is premium paid?

Premium amount:

Individual(s) covered by this policy:

Type of long-term care policy:

Waiting period:

Policy location:

Car insurance

Insurance company:

Customer service number:

Policy number:

Vehicle(s) covered:

Policy location: