



My Legacy Binder

Information My Family Should Know

Name : _____

Date Prepared : _____



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1. Personal Information

1.1 Basic Personal Details:

Name: _____

Date of Birth: _____

Place of Birth: _____

Home Address: _____

Phone: _____

Mobile: _____

E-mail: _____

Nationality: _____

Occupation: _____

Civil Status: _____

Name of Spouse: _____

1.2 Government IDs and Numbers:

GSIS Number: _____

SSS Number: _____

Tax Identification Number: _____

Philhealth: _____

PAG-IBIG: _____

Passport: _____

1.3 Immediate Family

[illegible]

1.4 Siblings and Close Relatives

[illegible]

1.5 Important Contacts

Business and Personal Contacts	Name	Address	Contact Number
Employer			
Pastor/Clergy			
Physician			
Dentist			
Accountant			
Financial Advisor			
Bank			
Insurance Agent			
Lawyer			
Other			

2. Financial Information

2.1 Bank Accounts

Name of Bank/Branch	Account Number	PIN*
		<i>Stored in digital password manager</i>

2.2 Investments

Investment Type	Institution/Platform	Account Reference	Contact Email

2.3 Pension/Retirement Benefits

Pension Type	Institution/ Platform	Account Reference	Receiving Bank/Wallet	Monthly Pension Amount

2.4 Insurance and HMO

Company	Policy Number	Coverage	Contact Person/Number

2.5 Financial Obligations

Type	Institution/Agency	Payment Schedule	Amount
Real Property Tax			
Car Loan			
Cooperative Loan			
Personal Loan			
Bills			

3. Properties and Assets

3.1 Real Estate Properties

Type	Location	Title Number/ Tax Dec Number	Area	Annual RPT Due

3.2 Other Assets

Asset Type	Description	Location	Important Notes
Car			
Jewelries			
Collectibles			

4. Digital Accounts and Passwords

[illegible]

5. Important Documents and Locations

Document	Location (Where it is Stored)	What to Do
Birth Certificate		
Marriage Certificate		
Land Titles		
Insurance Policies		
Passport		
Pre-need Plans		
Will/Testament		
Passbooks		

6. Final Wishes and Instructions

Religious service:

Clothes to be interred:

Music preference

Obituary Notice

Portrait to be used

Catering

Charity Donations

Disposition of Properties/Monetary Benefits

7. Messages to Loved Ones

7.1 _____

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

7.2 _____

[illegible]

7.3

