



TIAA-CREF Life Insurance Company

Your Personal and Asset Inventory



BUILT TO PERFORM.

CREATED TO SERVE.



Planning for your future—with the help of TIAA Life

For more information, log on to [TIAA.org](https://www.tiaa.org) or call 855-200-8937 to speak with a TIAA Life Insurance representative on any weekday from 8 a.m. to 8 p.m. (ET).

Financial well-being—through all stages of your life—doesn't happen by accident. It includes a combination of careful planning, sensible organization and trustworthy advice. And that's precisely where TIAA-CREF Life Insurance Company (TIAA Life) comes in. We're here to get you started with a collection of tools, resources and guidance to help get you where you want to be. Our focus is your well-being—and it begins right here with the TIAA Personal and Asset Inventory organizer.

Use this comprehensive guide to record all of your vital personal and financial information. It covers a variety of critical topics—from your family records to legal documents—and keeps everything in one place, at your fingertips, to access whenever you need it. This easy-to-use resource is just one way TIAA is dedicated to helping you prepare for the financial well-being and security for you and your family. You have the option to fill out your Personal and Asset Inventory online or to download and print a hard copy for your records.

Remember, we're here whenever you need us—to answer your questions and provide you with the information you need to help ensure your loved ones have the appropriate amount of financial protection. We offer a wide selection of retirement plans, life insurance, IRAs, after-tax annuities, education savings, and banking and home loans¹—all provided with the expertise and experience of TIAA.



Your Personal and Asset Inventory

Your Personal and Asset Inventory organizer is a living document; it requires frequent attention and updates to retain its effectiveness. And you can do so at any time by updating this form online, downloading it and printing a hard copy for your records. For assistance in filling out this organizer, call 855-200-8937 to speak with a TIAA Life Insurance representative, weekdays from 8 a.m. to 8 p.m. (ET).



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Personal information



[Download form here](#)

This collection of information about yourself and your family is the starting point for your financial planning, and should include an assortment of numbers and data from official identification documents.

1. Gather identification documents of yourself and of the members in your family—including drivers' licenses, Social Security cards and birth certificates.
2. After the identification documents are assembled, make acid-free color copies of each document should any page become lost or stolen.
3. Once the information is completely filled out, keep all originals in a safe place. Remember to save any government contact information to replace any official documents.

Personal information

Your information

Name (include previous names used)		
Address		
Phone number	Email	
Date of birth	Social Security number	Marital status (married / civil union / de facto [common-law])
License number	State of issue	

Spouse/partner information

Name (include previous names used)		
Address		
Phone number	Email	
Date of birth	Social Security number	Marital status (married / civil union / de facto [common-law])
License number	State of issue	

Child information

Name (include previous names used)		
Address		
Phone number	Email	
Date of birth	Social Security number	Marital status (married / civil union / de facto [common-law])
License number	State of issue	

Personal information (continued)

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue

Child information

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue

Personal information *(continued)*

Other

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue

Other

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue

Other

Name (include previous names used)

Address

Phone number

Email

Date of birth

Social Security number

Marital status (married / civil union / de facto [common-law])

License number

State of issue



Insurance



[Download form here](#)

Life insurance is the cornerstone of many sound financial plans. TIAA Life can assist you in selecting a life insurance strategy that provides the financial security that fits your family's needs.

1. Gather all documents that pertain to your life, health, home and auto insurance coverage—keep contact information for your providers as well.
2. Make copies of your original insurance coverage documents, and store them in a safe place; you or your survivors may need reliable, easy access should there ever be a need to file a claim.
3. Reassess your insurance coverage periodically to ensure that coverage stays current with any changes in your life.

Insurance - life / health / home / auto

Life insurance

Location of policy		Policy number
Issuer		Issue date
Address		
Amount	Phone number	Email
Website	Beneficiaries	

Health insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Automobile insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Insurance - life / health / home / auto (continued)

Homeowners insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Mortgage insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Home warranty policy

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Insurance - life / health / home / auto (continued)

Other insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Other insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	

Other insurance

Location of policy		Policy number
Issuer		
Address		
Issue date	Amount	Phone number
Email	Website	



■ Professional advisors



Download form here

This is a comprehensive record of advisors and professionals that are responsible for guidance in specific areas of your life plan—from finance to healthcare to legal representation. To discover how TIAA financial consultants can help you with your financial planning needs, call **855-200-8937**, weekdays from 8 a.m. to 8 p.m. (ET).

1. Gather contact information for each of the professionals that provide you and your family personal, financial and health guidance.
2. Because many of these institutions are moving to paperless recordkeeping, be sure to include digital contact information—including websites and email addresses.
3. Update this section frequently, as the people responsible for servicing your account can and will change frequently.

Professional advisors

Financial planner

<div>Name</div>		<div>Account number</div>
<div>Address</div>		
<div>Phone number</div>	<div>Email</div>	<div>Website</div>

Investment advisor

<div>Name</div>		<div>Account number</div>
<div>Address</div>		
<div>Phone number</div>	<div>Email</div>	<div>Website</div>

Accountant

<div>Name</div>		<div>Account number</div>
<div>Address</div>		
<div>Phone number</div>	<div>Email</div>	<div>Website</div>

Notary

<div>Name</div>		<div>Address</div>
<div>Phone number</div>	<div>Email</div>	<div>Website</div>

Professional advisors *(continued)*

Lawyer

<hr/>		<hr/>
Name	Address	
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Physician

<hr/>		<hr/>
Name	Address	
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Additional advisors

<hr/>		<hr/>
Name	Address	
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Additional advisors

<hr/>		<hr/>
Name	Address	
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Additional advisors

<hr/>		<hr/>
Name	Address	
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website



■ Important financial documents



[Download form here](#)

Use this section to record the institutions that you use to conduct your short- and long-term financial transactions—from banking and credit information to tax and student loan contacts. To speak with a TIAA financial planning consultant about your financial planning needs, or to find out more about insurance and nonqualified annuities, call **855-200-8935**, weekdays from 8 a.m. to 8 p.m. (ET).

1. Work in conjunction with your financial service providers to gather updated contact information and customer service channels.
2. Ask for copies of any documents that outline the services each financial institution provides for you and your family.
3. You should keep a record for each financial account you possess—including bank accounts, credit cards, loans and tax information.

Financial planner

Annuities

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Pension

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

401(k)

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

IRA

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Financial planner *(continued)*

Mutual funds

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

College savings plan

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Employers retirement plan

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Banking

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Financial planner *(continued)*

Banking

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Banking

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Banking

<hr/> Financial institution		<hr/> Account number
<hr/> Address		<hr/> Account type
<hr/> Phone number	<hr/> Email	<hr/> Website

Safe deposit box

<hr/> Financial institution		<hr/> Box number
<hr/> Address		
<hr/> Phone number	<hr/> Key location	

Financial planner *(continued)*

Mortgage

<hr/>		<hr/>
Lending institution		Loan number
<hr/>		
Address		
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Line of credit

<hr/>		<hr/>
Financial institution		Loan number
<hr/>		
Address		
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Line of credit

<hr/>		<hr/>
Financial institution		Loan number
<hr/>		
Address		
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Credit card

<hr/>		<hr/>
Financial institution		Loan number
<hr/>		
Address		
<hr/>		
<hr/>	<hr/>	<hr/>
Phone number	Email	Website

Financial planner *(continued)*

Credit card

Financial institution	Loan number	
Address		
Phone number	Email	Website

Automobile loan

Financial institution	Loan number	
Address		
Phone number	Email	Website

Student loan

Financial institution	Loan number	
Address		
Phone number	Email	Website

Taxes

Location of last year's taxes
Location of this year's taxes
Location(s) of income forms (1099, W-2, etc.)
Location(s) of deductible receipts

Financial planner *(continued)*

Other

Financial institution	Account number
Address	Account type
Phone number	Email
	Website

Other

Financial institution	Account number
Address	Account type
Phone number	Email
	Website

Other

Financial institution	Account number
Address	Account type
Phone number	Email
	Website

Other

Financial institution	Account number
Address	Account type
Phone number	Email
	Website



■ Important legal documents



[Download form here](#)

Use this section to document the legal decrees for items such as your marriage certificate, will and power(s) of attorney, as well as property documentation including automotive and home titles.

1. List the collection of legal documents that stipulate the conditions of such items as your last will and testament, military service record, marriage and/or divorce, and home and property information.
2. Make copies of your original documents and store them in a safe place; you may need them for reference at a later date.
3. Keep this list and any applicable documents up-to-date, and replace lost documents promptly.

Important legal documents

Will and/or revocable trust

Location of will/trust		Legal counsel for will/trust
Name		
Address		
Phone number	Email	Website

Additional mandates (in case of incapacity)

Legal power of attorney	
Medical power of attorney	
Executor/administrator of the estate	
Name	
Address	
Phone number	Email

Marriage / civil union / de facto (common-law) relationship

Location of documents		Date of event
Legal counsel for contract		
Name		
Address		
Phone number	Email	Website

Important legal documents *(continued)*

Separation / divorce decree

Location of documents		Date of event
Legal counsel for contract		
Name		
Address		
Phone number	Email	Website

Widow / widower

Location of spouse's death certificate	Date of death
--	---------------

Birth certificate / certificate of birth abroad / adoption decree

Location of birth certificate	Date and location of birth
Location of spouse's birth certificate	Date and location of birth
Location of children's birth certificate	Date and location of birth
Location of children's birth certificate	Date and location of birth
Location of children's birth certificate	Date and location of birth
Location of children's birth certificate	Date and location of birth

Important legal documents *(continued)*

Adoption decree

Location of adoption decree

Date and location of birth

Passport and visa

Location of passport

Country and date of issue

Expiration date

Location of visa

Country and date of issue

Expiration date

Military documents / VA discharge papers

Location

Date of service

Date of discharge

Home documents

Location

Mortgage closing paperwork

Location

Plot maps and boundary lines

Location

Important legal documents *(continued)*

Title

Location

Automobile

Title location

Make

License number

Model

Other

Location of documents

Date of event

Legal counsel for contract

Name

Address

Phone number

Email

Website

Other

Location of documents

Date of event

Legal counsel for contract

Name

Address

Phone number

Email

Website



Home and asset inventory



[Download form here](#)

This section outlines your physical possessions and will help prepare you should you experience a natural disaster—such as fire, tornado or hurricane—or should you be the victim of theft or vandalism.

1. Work in conjunction with your home insurance provider to complete a full list of items that may need replacing in the event of an emergency.
2. Make a video of each item you list and store it in a safe place; the video will be of invaluable use to replace any items in the event of an emergency.
3. For your most valuable items, make and file copies of receipts and proofs-of-purchase.

Inventory of valuables

Jewelry, art, collectibles and furniture

Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost
Item	Purchase date	Cost

Appliances, electronic and large purchases

Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties

Other

Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties
Item	Purchase date	Cost	Receipts and warranties



Helpful information



[Download form here](#)

Use this section to record professionals and institutions that provide home services, such as utilities, and any additional health care providers.

1. Ask for copies of all documents that outline the services of each provider.
2. Because many services are moving to paperless recordkeeping, include digital contact information such as websites and email addresses.
3. Update this section frequently, as the people responsible for servicing your accounts can and frequently will change.

Helpful information

Utilities and services

Gas company	Account number
Website	Phone number
Electric company	Account number
Website	Phone number
Water company	Account number
Website	Phone number
Phone company	Account number
Website	Phone number
Waste management	Account number
Website	Phone number
Cable/satellite company	Account number
Website	Phone number
Home security company	Account number
Website	Phone number

Helpful information *(continued)*

Utilities and services

Internet provider	Account number
Website	Phone number
Pest control	Account number
Website	Phone number
House cleaning service	Account number
Website	Phone number
Yard maintenance	Account number
Website	Phone number
Tree service	Account number
Website	Phone number
Gutter cleaning	Account number
Website	Phone number
Pool and spa service	Account number
Website	Phone number

Helpful information *(continued)*

Medical professionals

Physician

Website

Address

Phone number

Dentist

Website

Address

Phone number

Eye care professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number

Other medical professional

Website

Address

Phone number

Helpful information *(continued)*

Other service providers

Name	Website
Address	Phone number
Name	Website
Address	Phone number
Name	Website
Address	Phone number
Name	Website
Address	Phone number
Name	Website
Address	Phone number
Name	Website
Address	Phone number

Budget worksheet

Please use this space to map a realistic spending plan based on your income, expenses and goals. Planning and monitoring expenditures will help you identify wasteful expenditures, adapt quickly as your financial situation changes and achieve your financial goals.

Essential budget items	Per month
Household expenses	
Mortgage/rent	\$
Utilities/cable/internet	\$
General maintenance	\$
Household supplies	\$
Property tax & insurance	\$
Credit card debt payments	\$
Meals	
Groceries	\$
Beverages	\$
Essential entertaining	\$
Personal care	
Clothing	\$
Products/maintenance	\$
Healthcare	
Medicare/supplemental insurance	\$
Out-of-pocket payments	\$
Dental	\$
Eye doctor/glasses	\$
Other essential expenses	\$
Transportation	
Car payments/auto insurance	\$
Maintenance and fuel	\$
Taxes, registration, etc.	\$
Essential transportation costs	\$
Leisure and hobbies	
Essential spending	\$
Gifts and holidays	\$
Tax considerations	
Charitable contributions	\$
Income tax	\$
Other	\$
Miscellaneous	
	\$
	\$
	\$
	\$
TOTAL ESSENTIAL	\$

Discretionary budget items	Per month
Household expenses	
Home improvement	\$
New purchases	\$
	\$
	\$
	\$
	\$
Meals	
Dining out	\$
Entertaining	\$
	\$
Personal care	
The extras	\$
Products/maintenance	\$
Healthcare	
Other out-of-pocket insurance	\$
	\$
	\$
	\$
	\$
Transportation	
Discretionary travel	\$
Vacations	\$
Upgrades	\$
Other	\$
Leisure and hobbies	
Discretionary spending	\$
Gifts and holidays	\$
Tax considerations	
Charitable contributions	\$
Gifts	\$
Other	\$
Miscellaneous	
	\$
	\$
	\$
	\$
TOTAL DISCRETIONARY	\$



Prepare for whatever life has in store

Your Personal Asset and Inventory organizer is a great first step. Complete it today as a valuable aid for yourself and your family.

You can also turn to us for information on a wide selection of life insurance options and after-tax annuities, all provided with the expertise and experience of TIAA.

To speak with a TIAA Life Insurance representative, call **855-200-8937** on any weekday from 8 a.m. to 8 p.m. (ET).



TIAA-CREF Life Insurance Company®

1. TIAA Direct® is a division of TIAA-CREF Trust Company, FSB. Member FDIC. Equal Housing Lender 

529 college savings plans are offered and administered by a state. TIAA-CREF Tuition Financing, Inc. is the plan manager.

Guarantees are subject to the claims-paying ability of the issuing insurance company.

Investment, insurance and annuity products are not FDIC insured, are not bank guaranteed, are not bank deposits, are not insured by any federal government agency, are not a condition to any banking service or activity, and may lose value.

Investment products may be subject to market and other risk factors. See the applicable product literature, or visit TIAA.org for details.

Life insurance and annuity contracts contain exclusions, limitations, and reductions of benefits and may contain terms for keeping them in force. For full details, including costs, call us at 855-200-8937. Please note that the issuer has the right to contest the life insurance policy for misrepresentation by the applicant.

You should consider the investment objectives, risks, charges, and expenses carefully before investing. Please call 877-518-9161 or log on to TIAA.org/prospectuses for underlying product and fund prospectuses that contain this and other information. Please read the prospectuses carefully before investing.

TIAA-CREF Individual & Institutional Services, LLC, member FINRA, distributes securities products. Annuity contracts and certificates are issued by Teachers Insurance and Annuity Association of America (TIAA) and College Retirement Equities Fund (CREF), New York, NY.

After-tax annuities and life insurance are issued by TIAA-CREF Life Insurance Co., New York, NY. Each of the foregoing is solely responsible for its own financial condition and contractual obligations.

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