



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 loans<sup>1</sup>—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).



Click on any section to go directly to that page.

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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

Name	Account number	
Address		
Phone number	Email	Website

## Investment advisor

Name	Account number	
Address		
Phone number	Email	Website

## Accountant

Name	Account number	
Address		
Phone number	Email	Website

## Notary

Name	Address	
Phone number	Email	Website

Professional advisors (continued)

Lawyer

Name Address
Phone number Email Website

Physician

Name Address
Phone number Email Website

Additional advisors

Name Address
Phone number Email Website

Additional advisors

Name Address
Phone number Email Website

Additional advisors

Name Address
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

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Pension

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## 401(k)

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## IRA

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

# Financial planner *(continued)*

## Mutual funds

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## College savings plan

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Employers retirement plan

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Banking

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

# Financial planner (continued)

## Banking

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Banking

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Banking

Financial institution	Account number	
Address	Account type	
Phone number	Email	Website

## Safe deposit box

Financial institution	Box number
Address	
Phone number	Key location

# Financial planner (continued)

## Mortgage

_____		_____
Lending institution		Loan number
_____		
Address		
_____		
_____	_____	_____
Phone number	Email	Website

## Line of credit

_____		_____
Financial institution		Loan number
_____		
Address		
_____		
_____	_____	_____
Phone number	Email	Website

## Line of credit

_____		_____
Financial institution		Loan number
_____		
Address		
_____		
_____	_____	_____
Phone number	Email	Website

## Credit card

_____		_____
Financial institution		Loan number
_____		
Address		
_____		
_____	_____	_____
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

### 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

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

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



## 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](http://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](http://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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