



ELM3 FINANCIAL GROUP
5755 North Point Pkwy, Suite 92
Alpharetta, GA 30022
O: 678-297-9500 | F: 678-297-9514
elm3financial.com

Prepared For: _____ Date: / /

Directory: Key Individuals

Attorney

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____

Accountant

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____

Insurance Agent

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____

Financial Advisor

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____

Human Resources Contact

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____

Banker

Name: _____ Firm: _____
Phone Number: _____ Email Address: _____
Safe-Deposit Box: _____ Key Location: _____



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Prepared For: _____ Date: ____ / ____ / ____

Directory: Assets

Bank Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Brokerage Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Brokerage Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Mutual Fund Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Mutual Fund Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

IRA Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):



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IRA Account

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Company Retirement Plan

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Corporate Business Interest

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Real Estate

Description:	Owner:
Address:	
Amount/Fair Market Value (\$):	

Real Estate

Description:	Owner:
Address:	
Amount/Fair Market Value (\$):	

Life Insurance/Annuity

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):



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Prepared For: _____ Date: / / _____

Directory: Liabilities

Home Loan

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Home Equity Loan/Line of Credit

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Credit Card

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Credit Card

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):

Other Liabilities

Company:	Contact:	Phone Number:
Account #:	Document Location/URL:	
User Name:	Password:	Amount (\$):