



Sample ICE Plan Important Account Information

<u>Company</u>	<u>Account Name</u>	<u>Account Number</u>	<u>Notes</u>	<u>Contact Info</u>
First National Bank	Joint account	xxxxxx2209	Family account	1-xxx-xxx-xxxx
Online Brokerage	IRA Partner 1	xxxx-6147	Roth conversion	1-800-xxx-xxxx
	IRA Partner 2	xxxx-5534	Roth conversion	1-800-xxx-xxxx
Asset Management #1	Plan sponsor Corp. #1	xxxx-xxxx-2345	Husband 401(k)	1-800-xxx-xxxx
Asset Management #2	Plan sponsor Corp. #2	xxxx-xxxxxx-818	Wife 401(k)	1-800-xxx-xxxx
Financial adviser	Joint account	xxxxxx-1863	Taxable	1-xxx-xxx-xxxx
Mutual fund	Partner 1	xxxxx-7216	Taxable	1-800-xxx-xxxx
Commodity fund	Partner 2	xxxxx-5586	Taxable	1-800-xxx-xxxx
Credit cards	Card #1 (regular bills)	xxxx-xxxx-xxxx-4216	Automatic bill pay	
	Card #2 (all other)	xxxx-xxxx-xxxx-8937	All other	



In Case of Emergency Key Contact People

	Contact	Notes
Lawyer	John Doe (phone number)	Copy of will in the safety deposit
Accountant	Jane Smith (phone number)	Joint return
First National Bank Safety deposit box	Bob Anderson (phone number)	Downtown branch Keys in office desk and fire safe
Insurance agent Insurance carriers	Bob Jones (phone number) Insurance Company #1 Insurance Company #2	Jones Insurance Agency Home and auto Term life and disability
Mortgage broker Mortgage company	Mary Johnson (phone number) First Mortgage Company	Johnson Mortgage Brokerage Documents in ICE file
Wilson Financial Advisers	Ed Wilson (phone number)	Downtown location



In Case of Emergency (Cont.) Key Contact People

Contact

Notes

Access to passwords

Anne Martin

Log-in for password service

Bills on auto pay:

Using automatic bill pay credit

Electric

Gas

Water

HOA

Online payments for the following bills:

First National Bank's website

Mortgage

Credit card#1

Credit card #2