

Personal and Family Information

	Address	Phone	Email	Notes
Signifiant Other/Spouse				
Parent 1				
Parent 2				
Sibling 1				
Sibling 2				
Sibling 3				
Child 1				
Child 2				
Child 3				
Close Friend 1				
Close Friend 2				
Close Friend 3				
Password hint for phone:				
Password hint for computer:				

Important Contacts

	Name	Company	Address	Phone	Email
Accountant					
Attorney					
Auto Repair					
Child Care					
Employer					
Household Services					
Pharmacy					
School					
Security System					
Veterinary Care					
Other					

Medical

Specialization	Name	Company	Address	Phone	Email
Physician 1					
Physician 2					
Physician 3					
Physician 4					
Physician 5					

Allergies
Dietary Restrictions
Preferred Hospital

Medications/Treatments	Dosage / Notes	Dosage / Notes
1		5
2		6
3		7
4		8

Medical Conditions / Surgical History	Dosage / Notes	Dosage / Notes
1		5
2		6
3		7
4		8

Insurance

	Agent/Broker	Address	Phone	Policy #	Coverage
Accidental Death Insurance					
Auto Insurance					
Dental Insurance					
Disability Insurance					
Home Health or Long Term Care Policy					
Homeowners Insurance					
Life Insurance					
Other Insurance					
Primary Medical Insurance					
Supplemental Medical Insurance					
Vision Insurance					

Legal Documents

Location of Legal Documents

Financial Power of Attorney

Guardian/Conservator

Health Care Proxy

Living Will Directive

Trust

Will

Location of Items

Adoption/Custody Papers

Bank Statements

Birth Certificate

Citizenship Papers

Divorce Decree

Education Records/Diplomas

Employment Records

Insurance Policies

Investment Documents

Keys to house, car

Location of Items

Keys to safe

Keys to safety deposit box

Loan Documents

Marriage License

Motor Vehicle Titles

Passports/Visas

Real Estate Documents

Social Security Cards

Tax Returns

Voter Registration

Income and Expenses

Monthly Income

Self

Spouse

Total

Monthly Expenses

Company

Average Amount

When Due

How Paid

Phone Number

Mortgage/Rent

Other real estate

Electric

Gas

Water

Garbage

Phone

Cable

Food

Medication

Income and Expenses (Continued)

Credit Cards	Company	Average Amount	When Due	How Paid	Phone Number
1					
2					
3					
4					

Insurance

1					
2					
3					
4					

Bank Loans/Other

1					
2					
3					
4					

Location of Unpaid Bills

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Financial Accounts

	Company	Phone number	Notes (Account #, etc)
Checking Account 1			
Checking Account 2			
Savings Account 1			
Savings Account 2			
CDs			
Retirement Accounts (401K/IRA)			
1			
2			
3			
4			
5			
Other Assets (e.g., Stocks)			
1			
2			
3			
4			
5			

Final Arrangements

	Name	Company	Address	Phone	Email
Cemetary					
Mortuary					
Place of worship					
Organ donor? Y / N					
Burial/cremation instructions					
Special instructions for service					

Personal Property Inventory

Jewelry

Item	Value	Notes
1		
2		
3		

Item	Value	Notes
4		
5		
6		

Item	Value	Notes
7		
8		
9		

Art/Collectibles

1		
2		
3		

4		
5		
6		

7		
8		
9		

Furnishings

1		
2		
3		

4		
5		
6		

7		
8		
9		

Other (family heirlooms, photo albums, etc)

1		
2		
3		

4		
5		
6		

7		
8		
9		