



## Personal Information

NAME			
ADDRESS			
CITY			
STATE		ZIP	
PHONE			SPECIAL NOTES
EMAIL			
DATE OF BIRTH			
DRIVERS LICENSE			
VA CLAIM NUMBER			
OTHER INFORMATION			

## Family Members

NAME  
PHONE  
EMAIL

NAME  
PHONE  
EMAIL

NAME  
PHONE  
EMAIL

NAME  
PHONE  
EMAIL



## Who to Contact Immediately

NAME  
RELATIONSHIP  
PHONE - EMAIL

NAME  
RELATIONSHIP  
PHONE - EMAIL

NAME  
RELATIONSHIP  
PHONE - EMAIL

NAME  
RELATIONSHIP  
PHONE - EMAIL

SPECIAL NOTES

## Employer Information

COMPANY  
CONTACT NAME  
DETAILS  
DEATH BENEFITS  
OTHER

COMPANY  
CONTACT NAME  
DETAILS  
DEATH BENEFITS  
OTHER

COMPANY  
CONTACT NAME  
DETAILS  
DEATH BENEFITS  
OTHER

## Where are important papers located

MY WILL

SPOUSE WILL

FUNERAL PLANS

CEMETERY CHOICE

MORTGAGE

BIRTH CERTIFICATE

SOCIAL SECURITY CARD

LIFE INSURANCE

HEALTH INSURANCE

AUTO INSURANCE

HOMEOWNERS INSURANCE

BUSINESS INSURANCE

MILITARY DISCHARGE

AUTO TITLES

MARRIAGE CERTIFICATE

DIVORCE RECORDS

PRE-NUPTIAL AGREEMENT

DETAILS

DEATH BENEFITS

CHILDREN'S BIRTH CERT.

OTHER



SPECIAL NOTES

## Where are Financial papers located

CHECKING

SAVINGS

MONEY MARKET

PENSION PLANS

TAX RETURNS

LIST CREDIT CARDS

STOCK CERTIFICATES

MUTUAL FUNDS

BONDS

IRA, 401 PLANS

PROFIT SHARING PLANS

RETIREMENT FUNDS

RENTAL PROPERTY

NOTE OR LOANS

SAFETY DEPOSIT BOX

SAFE CODES

OTHER



SPECIAL NOTES

## Personal Items List *(Family heirlooms/Sentimental items)*

Talk to your children or people close to you about these items - Someone may be attached to a particular item. If two or more want the same item, settle it now.



SPECIAL NOTES

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM

ITEM

GIVEN TO (NAME)

LOCATION OF ITEM



## Medical Information

It is important to keep medical records up to date, in an event that a spouse or both parents become deceased before the two-year maturity date of a life insurance policy there may need to an investigation. This may require medical records.

### HUSBAND / PARTNER

DOCTOR

DENTIST

OTHERS

SPECIAL NOTES

MEDICATIONS

### WIFE / PARTNER

DOCTOR

DENTIST

OTHERS

MEDICATIONS



CHILD NAME

DOCTOR

DENTIST

OTHERS

SPECIAL NOTES

MEDICATIONS

CHILD NAME

DOCTOR

DENTIST

OTHERS

MEDICATIONS



PETS NAME

VETERINARIAN

PHONE

FEEDING SCHEDULE  
SPECIAL INSTRUCTIONSR

SPECIAL NOTES

PETS NAME

VETERINARIAN

PHONE

FEEDING SCHEDULE  
SPECIAL INSTRUCTIONSR

SPECIAL NOTES



## Insurance & Financial Information

### LIFE INSURANCE POLICY #1

POLICY HOLDER

COMPANY

CONTACT

POLICY #

AMOUNT

BENEFICIARY

### LIFE INSURANCE POLICY #2

POLICY HOLDER

COMPANY

CONTACT

POLICY #

AMOUNT

BENEFICIARY

### CAR INSURANCE POLICY #1

POLICY HOLDER

COMPANY

CONTACT

POLICY #

### CAR INSURANCE POLICY #2

POLICY HOLDER

COMPANY

CONTACT

POLICY #

### HOMEOWNERS INSURANCE POLICY

POLICY HOLDER

COMPANY

CONTACT

POLICY #



SPECIAL NOTES



HEALTH INSURANCE POLICY (PRIVATE)

POLICY HOLDER  
COMPANY  
CONTACT  
POLICY #

HEALTH INSURANCE POLICY (EMPLOYER)

POLICY HOLDER  
COMPANY  
CONTACT  
POLICY #

DISABILITY INSURANCE POLICY

POLICY HOLDER  
COMPANY  
CONTACT  
POLICY #

OTHER POLICY

POLICY HOLDER  
COMPANY  
CONTACT  
POLICY #

SPECIAL NOTES

## Memberships

ORGANIZATION

MEMBER ID

CONTACT

DETAILS

ORGANIZATION

MEMBER ID

CONTACT

DETAILS

ORGANIZATION

MEMBER ID

CONTACT

DETAILS



SPECIAL NOTES