

Getting Started: Your Details

The list covers the basics, but add/edit/delete as you need based on your life. Confirm you have the items on hand, and jot down on the form below where they are located.

Remember: Let one or two people you trust know where this information can be accessed if necessary. Give a copy to the Power of Attorney listed in your will, and keep a copy of this with your other important documents (will, living will, policies and licenses, etc.)

These details belong to: _____

They were last updated on: _____

Your Basic info:

Full Name:

Address:

Phone(s):

Email(s):

Birthday:

Social Security #:

Family Members contact info: Family, close friends, anyone listed in your Will and Living Will should be found here

- List: Full name, Relationship, Phone numbers, Email addresses, Home addresses, and any other relevant information

1)

2)

3)

4)

Licenses and Policies: Confirm you have/need copies, and where located

Marriage Certificate (certified copy):

Birth Certificate:

Car Insurance:

Home Insurance:

Life Insurance:

Banking and Business: Bank names and contact info

Checking account(s):

Savings account(s):

Other bank account(s):

401k(s):

Other savings/retirement funds:

Stocks:

Account(s) on auto-pay:

College savings (529 plan, etc):

Debt (credit cards, school loans):

Mortgage:

Passwords:

Home computer username and password:

Laptop username and password:

Online banking accounts:

Cell phone password:

Email(s):

Social networking sites (Facebook/LinkedIn/Flickr/etc.):

Online accounts (Netflix, iTunes, Amazon, etc):

Medical and Health:

Medical Insurance: (company and account #)

Medications:

Existing Conditions:

Allergies:

Allergies to medications:

Primary Care Physician:

Specialist(s):

Therapist:

Pediatrician:

Other:

My medical records are located:

Other Information: