

CONTACT & FINANCIAL INFORMATION

My Name

Address

Home phone

Business phone

Cell phone

Date of birth

Social Security number

Emergency Contacts

Name/Relationship

Telephone and address

Name/Relationship

Telephone and address

Family Confident

Telephone and address

Neighbors

Name

Telephone and address

Name

Telephone and address

Employer

Firm

Address and main telephone

Emergency contact at work and telephone

Insurance

Insurer _____ Policy number _____

Medicare/Medicaid _____ Policy number _____

Doctors

Primary care physician

Name/Practice name _____

Address and telephone _____

Other doctors: Specialty

Name/Practice name _____

Address and telephone _____

Specialty

Name/Practice name _____

Address and telephone _____

Specialty

Name/Practice name _____

Address and telephone _____

Clinic or Health Center

Type of treatment _____

Name/Practice name _____

Address and telephone _____

Pharmacy

Name and address _____

Location of/Contact for medications list _____

Attach List of Up-to-date list of medications (including drug names, dosages, location of/contact for medications list, what for and prescribing doctor)

Attorney

Has copy of last will and testament

Firm/Address/Telephone

Accountant

Firm/Address/Telephone

Tax preparer

Firm/Address/Telephone

Investment professional

Firm/Address/Telephone

Tax advisor

Firm/Address/Telephone

Insurance agent

Firm/Address/Telephone

Estate trustee

Name/Address/Telephone

Estate executor(s)

Name/Address/Telephone

Guardian(s) for children

Name/Address/Telephone

Power of attorney

Has advance medical directives
(e.g. living will)

Name/Address/Telephone

Pet(s) Pet Name, Chip ID, Species, and Coloring

Food and Water

Veterinarian's Contact Information

Desired Placement

Individual or Organization
and Contact Information

Property - Real Estate

(Description and Location)	(Original Cost)	(Present Market Value)	(Amount of Mortgage)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

Notes and Mortgages

(Name of Debtor)	(Description)	(Amount)	(Interest Rate)	(Rate of Payment)
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____

Leases

1. _____
2. _____
3. _____

Vehicles

- 1. _____
- 2. _____
- 3. _____

Bank Accounts/Savings Institution Accounts/Other Income-Producing Accounts

	(Name of Institution)	(Type)	(Account Number)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Retirement accounts

	(Beneficiary)	(Name of Institution)	(Account Number)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

College saving plans

	(Beneficiary)	(Name of Institution)	(Account Number)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

Mutual Funds/Stocks (note where statements are kept)

(Fund / Corporation)	(# of Shares)	(Original Cost)	(Market Value)
1.			
2.			
3.			
4.			
5.			

Insurance Policies (note policy locations)

(Company)	(Policy #)	(Face Value)	(Cash Value)
1.			
2.			
3.			
4.			

Other Assets

(Description)	(Location)	(Cost)	(Present Value)
1.			
2.			
3.			
4.			
5.			

Additional Notes

Other Important Records

Guideline: The more important the record, and the more expensive and difficult it is to replace, the safer the storage location should be. For some records (will, family history, tax returns, and household inventory) you may wish to keep copies in more than one location. **Group A** items should be kept in a safe deposit box or fireproof and burglarproof home safe. **Group B** items can generally be stored in a home business center, file cabinet, desk, etc. **Group C** items should be carried in your purse or pocket.

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Group	Record Type	Where Kept?	Additional Information
A	Adoption papers		
	Baptismal Records		
	Bill(s) of sale		
	Citizenship papers		
	Diplomas		
	Divorce papers		
	Easements/Rights of way		
	Household Inventory		
	Irreplaceable Receipts /Proof of tax deductions		
	Marriage certificate		
	Military records		
	Passport papers		
	Power of Attorney		
	Will(s)		

Group	Record Type	Where Kept?	Additional Information
B	Education records		
	Employment records		
	Family history		
	Funeral/Burial Records		
	Household Inventory (copy)		
	Income/expense records		
	Income tax returns / Replaceable proofs of deductions		
	Medical records		
	Net worth statements		
	Safe deposit box inventory		
	Appliance manuals / Warranties		
	Will(s) (copy)		
C	Employee ID Card(s)		
	ID Card/whom to notify in emergency		
	Insurance/Medical cards		
Other			



“The minister of the congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.”

—THE BOOK OF COMMON PRAYER PAGE 445