

# WHAT MY FAMILY SHOULD KNOW

Personal Information .....

	Self	Spouse
<b>Name</b>		
<b>Social Security #</b>		
<b>Passport # / Expires</b>		
<b>Driver's License # / Expires</b>		
<b>Date of Birth</b>		
<b>Place of Birth</b>		
<b>Date of Marriage / License #</b>		
<b>Current Address</b>		
<b>Home Phone</b>		
<b>Mobile Phone</b>		
<b>Email</b>		

Will Details .....

	Self	Spouse
<b>Location</b>		
<b>Dated</b>		
<b>Executor</b>		
<b>Named Guardian</b>		

Children .....

Name	Social Security #	Date of Birth / Place	Address	Phone

# WHAT MY FAMILY SHOULD KNOW

## Family Contacts .....

Relation	Name	Address	Phone

## Other Contacts .....

Relation	Name	Address	Phone
Pastor/Church			
Doctor			
Doctor			
Pediatrician			
Dentist			
Dentist			
Attorney			
Accountant/Tax Preparer			
Financial Advisor			
Other			

# WHAT MY FAMILY SHOULD KNOW

Insurance.....

Insurance Type	Insurance Company / Contact Information	For	Insurance Amount / Expires
Homeowners		Address:	
Auto		Make/Model: VIN: License: Plate:	
Auto		Make/Model: VIN: License: Plate:	
Life		Insured:  Beneficiary:	
Life		Insured:  Beneficiary:	
Medical			
Dental			
Disability			

# WHAT MY FAMILY SHOULD KNOW

## Financial Information .....

Account Type	Bank/Issuer	Phone Number	Account Number
Checking			
Checking			
Savings			
Savings			
Credit Card			
Credit Card			
Credit Card			
Loan – Car			
Loan – Car			
Loan – Mortgage			
Loan – Student			
Loan – Student			
Retirement			
Retirement			
Safety Deposit Box			

## Bills .....

Description	Company	Phone Number	Due Date	Amount	Account Number
Alarm					
Cable					
Car Insurance					
Car Note					
Car Note					
Credit Card					
Credit Card					
Day Care					
Electric					
Gas					

# WHAT MY FAMILY SHOULD KNOW

Gym					
Home Insurance					
Life Insurance					
Mortgage					
Phone					
Property Taxes					
Student Loan					
Water					

Work Information .....

	Self	Spouse
<b>Employer</b>		
<b>Address</b>		
<b>Work Phone</b>		
<b>Work Email</b>		
<b>Supervisor</b>		
<b>Supervisor's Phone / Email</b>		

Where to Find .....

Item	Location
<b>Address Book</b>	
<b>Banking Documents / Statements</b>	
<b>Birth Certificate</b>	
<b>Credit Cards / Statements</b>	
<b>Extra Keys</b>	
<b>Home Videos</b>	
<b>Income Tax Records</b>	
<b>Insurance Policies</b>	

# WHAT MY FAMILY SHOULD KNOW

<b>Item</b>	<b>Location</b>
<b>Investment Records</b>	
<b>Legal Documents</b>	
<b>Loan Documents</b>	
<b>Marriage License</b>	
<b>Passports</b>	
<b>Passwords / Website Logins</b>	
<b>Pet Records</b>	
<b>Pictures</b>	
<b>Safety Deposit Box Key</b>	
<b>Social Security Card</b>	
<b>Storage Unit</b>	
<b>Vaccination Records</b>	
<b>Vehicle Information (Loan, Title, Registration, etc.)</b>	
<b>Website Logins</b>	
<b>Will</b>	