Personal Information & Key Contacts

The details someone would need to act for you. Do not write your Social Security number or any passwords here.

About me

FULL LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

MARITAL STATUS

SPOUSE OR PARTNER'S NAME

ASSOCIATION MEMBERSHIP ID

WHERE MY SOCIAL SECURITY CARD IS KEPT

My family

Name	Relationship	Phone	Email or address

Key contacts

Role	Name	Phone	Email or firm
Executor			
Backup executor			
Financial power of attorney			
Health care agent			
Attorney			
Accountant / tax preparer			
Insurance agent			
Doctor			
Employer / benefits office			
Faith leader			

For your personal records. This kit is not a will and is not legal advice. Laws vary by state; talk to a licensed attorney about your situation.