IMPORTANT INFORMATION FOR MY FAMILY

Updated _____

If something has happened to me

1. Call the people listed in **Section 2, Key contacts**.
2. My will and legal papers are listed in **Section 4**.
3. Anything marked 🔒 was left to be written by hand, on purpose.

This binder is kept

Backup file passphrase

This binder helps your family find things. It is not a will or a legal document.

Start here

Read this first. It says who to call, where the important papers are and what can't wait. Everything else is behind the numbered tabs.

1 Call these people first

Name, relationship, phone

2 Where the important papers are

Will (the original)

Trust

Financial power of attorney

Health care power of attorney

Advance directive

Life insurance policies

Birth certificate

Social Security card

3 What can't wait

Pets

People who depend on me

Automatic payments to stop

Spare keys

4 This binder

Copies of this binder are with

The backup file is kept

Passwords, PINs and codes are written by hand in the sections, next to a lock.

1 About me

Full legal name

Full legal name

Other names you have used

Birth

Date of birth

Place of birth

Where the birth certificate is

Social Security

Social Security number *Write here by hand*

Where the card is

Driver's license or ID

Circle one Yes No

Where it is

When it expires

Marriage

Circle one Yes No

Spouse or partner

Where the certificate is

Military service

Circle one Yes No

Branch and years

Where your DD-214 is

Notes

2 Key contacts

Call first

People to call first

Doctor

Circle one Yes No

Name and practice

Phone

Attorney

Circle one Yes No

Name and firm

Phone

Advisor or accountant

Circle one Yes No

Name and company

Phone

Neighbor with a key

Circle one Yes No

Name and address

Phone

Notes

Things to find

Questions marked “come back later” or “not sure”. Tick each one when you’ve found it, then add it to the binder.

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