

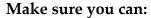
Family Information Checklist



Whether you're paying bills, making medical appointments or managing investments, you deal with a lot of important household information on a regular basis. Each member of the household keeps track of certain items, and it's hard for everyone to remember it all. If the gatekeeper of information isn't around or can't communicate, how will your household run?



This document is a checklist you can use to organize and keep track of family and household information. Other family members, your agents, or emergency contacts can use this information to manage your affairs if they need to.



- 1. Locate or create each item on the checklist that applies to your family.
- 2. Create a binder or have a central location to keep all the items on the checklist. Choose a location that is secure and where you feel like the information won't be damaged. Certain original documents should be kept in a fireproof, waterproof safe.
- 3. Tell family/agents/emergency contacts where they can find information to manage your affairs if needed.
- 4. Update information every year. An electronic version of this checklist is included on your thumb drive, so you can print a fresh copy if you need to.



Phone: 414-909-2787

Email: marisa@zanelawllc.com

Web:

www.zanelawllc.com



VITAL RECORDS ☐ Birth certificates ☐ Marriage certificate ☐ Drivers licenses (copies) ☐ State-issued ID cards (copies) ☐ Military ID cards (copies) ☐ Passports ☐ Social Security cards ☐ Current military records ☐ Military discharge paperwork ☐ Religious records □ Death certificates **PET INFORMATION** ☐ Current photos $\hfill\square$ Name, age, species, and breed information □ ID chip numbers ☐ Care instructions **EMERGENCY PLANS** ☐ Family evacuation plan ☐ Evacuation checklist

CONTACTS

EMERGENCY CONTACTS ☐ Family and friends (addresses and phone numbers) ☐ Schools ☐ Childcare providers □ Work contacts ☐ Primary care providers ☐ Dentist □ Veterinarian ☐ Pet sitter/kennel □ Accountant ☐ Financial adviser ☐ Lawyers ☐ Insurance agents **LOCAL NON-EMERGENCY NUMBERS** □ Police ☐ Fire

☐ Utility companies (water, gas, electric, etc.)

☐ Hospitals/clinics



MEDICAL INFORMATION

☐ Powers of attorney for health care
☐ Living will (Declaration to Physicians)
☐ Health insurance cards (copies)
☐ Medical history
☐ Current prescriptions for each household member
☐ Current medical treatment plans
☐ Immunization records
$\hfill\square$ Contact information for health care providers you see regularly
☐ Log-in information for online medical records

LEGAL

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GAL INFORMATION			
	Wills, separate writing agreements and codicils		
	Trusts		
	Powers of attorney (for you or someone else)		
	Guardianship papers		
	Divorce decrees		
	Child custody/placement papers		
	Adoption/foster records		
	Naturalization/immigration/visa information		
	Settlements and judgments		
	Attorney contact information		

PROPERTY

PROPERTY RECORDS Deeds Property tax records Mortgage documents (and log-in information for online mortgage accounts) Automobile registration (copies) and titles Registration and titles for recreational vehicles (campers, boats, ATVs, snowmobiles, etc.) Auto loan documents Rental agreements Household inventory of personal property (furniture, appliances, tools, clothing, electronics, jewelry, furs, art, collectors items, etc.) Appraisals Log-in information for online utility accounts (water, gas, electricity, trash, etc.)

EDUCATION

SCHOOL RECORDS

Transcripts
Report cards
Test scores
Academic accommodations
School forms
Academic calendars
School schedules
Teacher/coach contact information
Log-in information for student/parent portals

FINANCE

ACCOUNTS ☐ Checking ☐ Savings ☐ Retirement (pension, IRA, 401(k), 403(b), HSA) ☐ Certificates of deposit ☐ Brokerage accounts ☐ Safety deposit box information ☐ Credit cards ☐ Student loans ☐ Mortgages ☐ Auto loans ☐ Personal loans ☐ Contact information for banks, credit cards and other financial institutions **RECORDS** ☐ Power of attorney for finances ☐ Federal and state tax returns ☐ Paystubs ☐ Log-in information for all online financial accounts

INSURANCE

INSURANCE

	Health insurance policy
	Health insurance cards (copies)
	Auto insurance policy
	Auto insurance cards (copies)
	Homeowners insurance
	Renters insurance
	Umbrella insurance
	Recreational vehicle insurance
	Natural disaster insurance (flood, earthquake, etc.)
	Life insurance
	Disability insurance
	Long-term care insurance
	Contact information for insurance carriers
	Log-in information for online insurance accounts
WAR	RANTIES
	Automobile warranties
	Home warranty
	Appliance warranties
	Repair/maintenance contracts

PROFESSIONAL

BUSINESS/PROFESSIONAL INFORMATION

Professional licenses and certificates
Employment contracts
Paystubs
Business organization documents (operating agreements, articles of incorporation, etc.)
Business loan information
Liens/judgments
Business taxes
Business/professional liability insurance
Business succession plan
Contact information for supervisors, partners, assistants and other important business
associates

CONGRATULATIONS!

Your important family information is organized. Just as you should update this information regularly, you should review your estate plan every few years and after major life events. Please contact me so we can review your estate plan and make sure it's up to date.

Marisa Zane, Attorney

Phone: 414-909-2787

Email: marisa@zanelawllc.com

