

# Table of Contents

---

## Introduction

- Personal Transitions: How To Take Charge ..... 4

## Personal

- Personal Profile ..... 6
- Personal History ..... 8
- Spouse/Partner Personal Profile ..... 9
- Spouse/Partner Personal History ..... 11
- Key Family & Friends to Contact in Case of Emergency ..... 12
- Personal Advisors And Contacts ..... 13
- Children ..... 17
- Parents ..... 19
- Siblings ..... 20
- Pet Information ..... 21
- Family Tree ..... 23
- Personal And Confidential Information ..... 25
- Location Of Important Items And Documents ..... 26
- Sensitive or Personal Family Information ..... 27
- Special Dates ..... 28

## Household

- Information About My Home ..... 30
- Household Instructions ..... 31
- Household Resources ..... 32
- Household Inventory ..... 33
- Home Improvements ..... 35
- Emergency Plan And Supplies Checklist ..... 37
- Disaster Preparedness ..... 38
- Minimize Your Own Impact ..... 40

## Personal Assets

- Personal Assets – Advisors and Contacts ..... 41
- Information About Real Estate I Own ..... 43

## Personal Assets (continued...)

• Information About Vehicles Owned/Leased .....	44
• Information About My Personal Property .....	45
• Information About My Personal Property Storage .....	46
• Information About My Collections .....	48
• Information About My Business .....	49
• Insurance .....	50
• Safe Deposit Box Information .....	52
• Rewards Programs .....	54
• Anticipated Assets .....	55

## Finances

• Financial Advisors And Contacts .....	56
• Bank Accounts .....	58
• Investment Accounts .....	62
• Retirement Plans .....	63
• Stocks, Bonds, Mutual Funds .....	64
• Loans/Accounts Payable .....	65
• Loans/Accounts Receivable .....	66
• Credit Card Information .....	67
• Personal Monthly Income .....	69
• Personal Monthly Expenses .....	70
• Personal Financial Statement .....	71
• Preventing Identity Theft .....	72
• Credit History .....	73

## Legal

• Legal Advisors And Contacts .....	74
• Information About My Will .....	75
• Information About My Living Trust .....	76
• Information About My Power Of Attorney For Finances .....	77
• Information About My Power Of Attorney For Health Care .....	78
• Guardian For Minor Children/Person With Special Needs .....	79

# Table of Contents

---

## Introduction

- Personal Transitions: How To Take Charge ..... 4

## Personal

- Personal Profile ..... 6
- Personal History ..... 8
- Spouse/Partner Personal Profile ..... 9
- Spouse/Partner Personal History ..... 11
- Key Family & Friends to Contact in Case of Emergency ..... 12
- Personal Advisors And Contacts ..... 13
- Children ..... 17
- Parents ..... 19
- Siblings ..... 20
- Pet Information ..... 21
- Family Tree ..... 23
- Personal And Confidential Information ..... 25
- Location Of Important Items And Documents ..... 26
- Sensitive or Personal Family Information ..... 27
- Special Dates ..... 28

## Household

- Information About My Home ..... 30
- Household Instructions ..... 31
- Household Resources ..... 32
- Household Inventory ..... 33
- Home Improvements ..... 35
- Emergency Plan And Supplies Checklist ..... 37
- Disaster Preparedness ..... 38
- Minimize Your Own Impact ..... 40

## Personal Assets

- Personal Assets – Advisors and Contacts ..... 41
- Information About Real Estate I Own ..... 43