



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.



Make sure you can:

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
- 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
- Hospitals/clinics
- Utility companies (water, gas, electric, etc.)

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
- Contact information for health care providers you see regularly
- Log-in information for online medical records

LEGAL 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

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

WARRANTIES

- Automobile warranties
- Home warranty
- Appliance warranties
- Repair/maintenance contracts

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

