

# My information

Template last revised March 2024

You can download the template from <http://www.suekayton.com/InformationForMyFamily.doc>

Filled-in information last revised (put date here)

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## **GENERAL** | [Top](#)

My personal information:

- name
- primary address
- Landline phone (xxx) xxx-xxxx (if you have one)
- Cell phone (xxx) xxx-xxxx
- Birthdate xxxxx in (city, state, country)
- Social security number xxx-xx-xxxx
- Emails: [xxx@xxx.com](#) and [xxxx@xxx.com](#)
- Drivers license or state ID card xxxxxxxx in state xxxxxx expires xxxxxxxx
- Passport number and country, with expiration date
- Location of my will/trust
- Location of safe deposit box (if any) including box number and key location
- Location of home safe (if any) including combination or key location

My secondary address (if any):

- Address
- Landline phone
- Location of keys
- Caretaker or property management info (if any)
  - Name, address, phone, email, website

Login usernames and passwords (and PIN if used) for your primary computer, smartphone, and/or tablet.

- SmartPhone (if any)
  - Unlock code or pattern
  - PIN (if used)
  - If it's an iPhone, your AppleID and AppleID password
  - If you normally unlock with your fingerprint, make sure you know the unlock code and write it down, for when your fingerprint is no longer available.
- Desktop computer (if any)
  - Login username
  - Password

PIN  
BIOS password, BitLocker key, or hard drive password (if used)  
Laptop computer (if any)  
    Login username  
    Password  
    PIN  
    BIOS password, BitLocker key, or hard drive password (if used)  
Tablet (if any)  
    Unlock code  
    PIN (if used)  
    If it's an iPad, your AppleID and AppleID password  
    If you normally unlock with your fingerprint, make sure you check the unlock code  
        and write it down, for when your fingerprint is no longer available.  
Email address(es) and password(s). Make sure to distinguish upper-case from  
    lower-case and distinguish the letter O from zero, and distinguish the letter I from  
    the number 1.  
Password manager (if used)  
    Name of company and their website URL  
    Login username and password  
    Security questions and answers  
    Login information for account/phone to which two-factor authentication is sent  
Computer and phone data backup location – do you back up to Google Drive, iCloud,  
Microsoft OneDrive, DropBox, Carbonite, BackBlaze or other service? If so, provide the name  
of the service, and the login username and password to access it.

List the location of important documents and papers. Be specific. If in a locked drawer, list  
where keys are located. If in a safe, provide combination to safe. A sample list appears at the  
end of this document.

## **PEOPLE** | [Top](#)

Next of kin:

Name  
Address  
Phone  
Email

Executor of will or successor trustee(s) of trust. Provide contact information:

Name  
Address  
Phone  
Email

If you do not have a general Power of Attorney form nominating a conservator should you need  
one, execute such a form and include it with your important papers.

If you have dependent children or dependent relatives, list them here. For each, provide contact information, dietary restrictions, and important medical and other information. For each, include contact information for doctors, dentists, physical therapists, etc. If your child is young enough to use a security blanket or favorite stuffed animal, or needs a particular bedtime ritual, include that information.

If you have pets, list them here and provide contact information for their veterinarian(s). If your will or trust does not contain this information, state the disposition of your pets when you are no longer able to or willing to care for them. For each pet, provide its name, any dietary restrictions, and other important information.

Accountant: name, address, phone, email

Lawyer: name, address, phone, email

Neighbors or nearby contacts:

Name, address, phone, email

House cleaner or cleaning service: Name, address, phone, email. Website and login info if it is a service

Pool guy: Name, address, phone, email

Handyman: Name, address, phone, email

Computer person: Name, address, phone, email

Gardener: Name, address, phone, email

Auto mechanic: Name, address, phone, email

Counselor or therapist: Name, address, phone, email

Physical therapist: Name, address, phone, email

Hairdresser or barber: Name, address, phone, email

Personal trainer: Name, address, phone, email

Other people who the family/heirs might want to contact:

## **MEDICAL CARE** | [Top](#)

Primary care physician

Doctor's name, address, phone, email

Medical record number

Medicare number xxxxxxxx

Durable power of attorney for medical care and POLST forms:

Where to find a copy

For your primary decision maker, provide:

Name

Address

Phone

Email

## Pharmacy

Name, address, phone number

## Medical group name

Website

Online login username and password

List specialists that you see such as:

Oncologist name, phone number

Podiatrist name, phone number

Urology name, phone number

Ophthalmology name, phone number

Neurology name, phone number

## Medical alert system (if you have one)

Website, account number, emergency contact, payment info

## Healthcare equipment provider (if you have one)

Website, phone, account number, username/password

Payment info

## Personal assistant provider (if you have one)

Website, phone, account number, username/password

Payment info

## Dentist name and phone

## Periodontist name and phone (if you have one)

## Physical therapist name and phone (if you have one)

## Psychologist, family therapist, or psychiatrist name and phone (if you have one)

## Eyeglasses prescription and contact info for dispensing optician

# **INSURANCE** | [Top](#)

## Homeowners, renters and/or and earthquake insurance

Agent name, phone, address (if you have one)

Company name, policy number(s), contact phone

Company website, login username, login password

Autopay information

## Life insurance (if any). For each policy, list:

Agent name, phone, address (if you have one)

Company name, policy number(s), contact phone

Company website, login username, login password

Autopay information

#### Auto insurance

- Agent name, phone, address (if you have one)
- Company name, policy number(s), contact phone
- Company website, login username, login password
- Autopay information
- Vehicle make/models, years and license plates. Location of keys

#### Umbrella insurance (if with separate company)

- Agent name, phone, address (if you have one)
- Company name, policy number(s), contact phone
- Company website, login username, login password
- Autopay information

#### Medical insurance, dental insurance, vision insurance, and all Medicare supplements (list each separately)

- Company name
- Website
- Login userID/password
- Customer service phone number
- Policy number
- Date policy expires
- Autopay and billing information

#### Long term care insurance

- Company name
- Website
- Login userID/password
- Customer service phone number
- Policy number
- Date policy expires
- Autopay and billing information

Insurance for boat, second home, professional liability, or others not listed above.

## **FINANCIAL INSTITUTIONS** | [Top](#)

#### Banks, savings and loans, and credit unions (if more than one, list each separately)

- Name of bank
- Account number(s)
- Address
- Phone
- Contact name if you have an assigned banker
- Website
- Login username/password
- List of autopays coming from accounts
- Bank routing number (used to set up autopays)

Safe deposit box number (if any) and location of key

Brokerage accounts (if more than one, list each separately)

Name of brokerage

Account number(s)

Address

Phone

Contact name if you have an assigned banker

Website

Login username/password

List of autopays coming from accounts

Bank routing number (used to set up autopays)

Safe deposit box number (if any) and location of key

List of stocks and bonds held outside of a brokerage account. If you have paper certificates, list their location and certificate numbers. If you have electronically-held shares, for each company list contact information for the transfer agent.

Pension or company retirement plan

Name of company

Account number(s)

Address

Phone

Contact name if you have an assigned banker

Website

Login username/password

List of autopays coming from this account

Method for getting disbursement

Annuity (if any)

Name of company

Account number(s)

Address

Phone

Contact name if you have an assigned banker

Website

Login username/password

If automatic withdrawal set up, where does it go?

401K, IRA, etc. if held at places not listed above.

Loans or lines of credit if with other than above. For each list:

Name of company

Account number(s)

Address

Phone

Contact name if you have an assigned banker

Website

Login username/password  
Autopay information

PayPal, Google Wallet, Apple Pay or other online payment systems  
For each, website, username, and password

Keep current list of past IRA withdrawals so people know when the next required disbursement will be needed.

If you have a file of current-year tax documents to help prepare this year's tax return, list the location of this paper file and/or computer files.

List here payees that are set up to auto-pay from your bank account(s), and which accounts they are directly paid from

## **CREDIT CARDS and ONLINE SHOPPING** | [Top](#)

For each card or online merchant (such as Macys, Amazon, Citibank, etc, list:

- Company name
- Credit card number (if any) with expiration date
- For credit cards, CVC code (or code on front for Amex card)
- Customer service phone number
- Website
- Login username/password
- List of autopays set up on this card

## **TRANSPORTATION** | [Top](#)

Cars, motorcycles and trucks – for each list

- Make/model/year
- License plate
- Location of title document

Boats (if any). For each list make/model/year and hull number, and location of title document.

Uber, Lyft or other rideshare programs

- For each list website, username, password, autopay information

OnStar, Garmin, or other in-vehicle system (specify which)

- Website
- Username, password
- Autopay information

Clipper card or other mass transit access cards

- Website
- Username, password

Autopay information

EZPass, FasTrak or other toll tag information

Company name

Website

Account number

Login username/password

Autopay info

Frequent flyer accounts. For each provide:

Company name

Website

Account number

Login username/password

Autopay info

If you don't keep a record of repairs and maintenance for your vehicles, provide the contact information for your mechanic, so these records can be obtained.

## **RESIDENCE AND UTILITIES** | [Top](#)

If renting, contact information for landlord

Name

Address

Phone

Email

If sharing the dwelling, contact information for each roommate, co-tenant or co-owner

Name

Address

Phone

Email

Mortgage or reverse mortgage (if more than one, list for each)

Account number

Company who handles it

Account number

Website

Customer service number

Login username and password

Security questions on account

Autopay information

If you have a homeowners' association, provide contact information

Name

Address

Phone

Email



Dues paid until what date?  
Autopay for dues, if applicable

Home alarm system (if any)  
Location of control panel  
Disarm code and instructions  
Arming instructions  
Company who handles it  
Account number  
Website  
Customer service number  
Login username and password  
Security questions on account  
Autopay information

Phone landline (if you have one)  
Phone number  
Company who handles it  
Account number  
Website  
Customer service number  
Login username and password  
Security questions on account  
Autopay information

Cell phone  
Phone number  
Phone unlock code (if smartphone)  
Tablet unlock codes (if you have one or more)  
Company who handles it  
Account number  
Website  
Customer service number  
Login username and password  
Security questions on account  
Autopay information

Instructions to access messages on your voicemail system. Be specific, and include any password or access key.

Internet provider (if used, and if separate from the above)  
Associated phone number  
Company who handles it  
Account number  
Website  
Login username/password  
Security questions  
Autopay information

Modem/gateway/router username and password (if changed from default)  
WiFi network name and password (if you changed from default settings)  
Modem/router login username/password (if you changed from default settings)

Cable TV provider (if used, and if separate from the above)

Associated phone number  
Company who handles it  
Account number  
Website  
Login username/password  
Security questions  
Autopay information

Trash service (if not handled by landlord or property tax bill)

Company who handles it  
Customer service number  
Account number  
Website  
Login username and password  
Autopay information

Water service (if not handled by landlord)

Company who handles it  
Customer service number  
Account number  
Website  
Login username and password  
Autopay information

Gas service (if not handled by landlord)

Company who handles it  
Customer service number  
Account number  
Website  
Login username and password  
Autopay information

Electricity service (if not handled by landlord)

Company who handles it  
Customer service number  
Account number  
Website  
Login username and password  
Autopay information

Sewer or septic tank service (if not handled by landlord or property tax bill)

Company who handles it  
Customer service number

Account number  
Website  
Login username and password  
Autopay information

House repair service (if you have a provider)

Company who handles it  
Customer service number  
If you have a monthly or yearly contract, paid until when?  
Account number  
Website  
Login username and password  
Autopay information

Property tax collector. (if appropriate)

Assessor's parcel number for house  
Customer service number  
Website for payment via internet direct to county assessor  
Autopay information, if any

P.O. Box (if any)

Address of P.O. Box  
Set up online access through <https://poboxes.usps.com/manageAccount.html>  
Login username/password  
Paid through xxxxx date

Home delivery information for scheduled service such as water, medical supplies, etc.

Home IOT (smart home) system information, such as Nest, Ring, LiftMaster, etc. (if any)

Location of controlling device(s)  
Login info for controlling device (username/password)  
Website or IP address for controller

Home theater or entertainment system information (if appropriate)

Location of wiring diagram  
Contact information for person who handled installation  
Please do everyone a favor and label the wires

Gardener contact information (if you have one)

Pool guy contact information (if you have one)

Anything unusual that someone would need to know to live in, or sell your property, such as the location of underground pipes carrying downspout water run-off, code to side gate, function of mystery switches, where to kick the dishwasher to make it turn on, etc.

**MISCELLANEOUS** | [Top](#)

Email provider(s)

For each, list provider name, email address, password, security questions, recovery method(s)

Club, gym, museum, and association memberships. For each:

Club/association name

Contact name, address, phone, website

Note which ones are on autopay and provide login information (username, password) for autopays

Newspaper subscriptions. For each one list:

Company

Indicate whether subscription is paper, digital only, or both

Customer service phone number

Account number

Website

Login username and password

Autopay information

Magazine subscription list for purposes of forwarding if you move.

Online subscriptions such as Microsoft 365, LastPass, Adobe Creative Suite, Intuit, etc.

For each provide:

Company name

What you have the subscription for

Website

Login username/password

Autopay method

Other subscriptions such as DoorDash, professional associations, Netflix, Hulu, Spotify, DisneyPlus, Peacock, Sirius, Pandora, etc. For each provide:

Company name

What you have the subscription for

Customer service phone number

Website

Login username/password

Autopay method

Passwords for encrypted Excel spreadsheets, Quicken files, QuickBooks files, BitLocker hard drives, computer BIOS, and other computer files and computer hardware.

Social Security

Set up an online account at <https://secure.ssa.gov/RIL/SiView.action>

You will need to answer tough security questions or call them on the phone.

Your heirs might be eligible for Social Security survivor's benefits

Get list of Social Security numbers for immediate family members and heirs

Veterans Administration

Your heirs might be eligible for VA survivor's benefits.

If you served in the military, provide location of your service records

Auto Club (AAA) membership

Account number

Paid through date

Autopay information

Website

Website login username and password

Data, system and photo backup storage location (if any)

For online backup account:

Company name (Google Drive, Google Photos, Dropbox, OneDrive, etc.)

Website

Login username and password

For local backup, location of your backup drive and decryption key, if needed

Medical alert device (if any)

Company that handles it

Account number

Customer service number

Autopay information

Website

Website username and password

List of people (and contact info) they contact when it goes off

Storage units (if any)

Company name

Address

Phone

Unit number(s)

Combination to lock, or location of key(s)

Paid through what date

Autopay information

Website

Pre-paid cremation or burial plan (veterans may qualify for free burial at a VA cemetery)

Company

Customer service phone number

Account number

Autopay information (if not fully paid)

If you own a cemetery plot, provide:

Name of cemetery

Full address

Phone number

Account number or plot number  
Names of people who are authorized to bury someone there  
Contact information for authorized users of the plot  
If you don't have a pre-paid plan, do everyone a favor and write down your wishes. Do you want to be cremated and have your ashes scattered at sea?

Memorial service information.

Clergyperson contact information (if any)  
List of people with contact information that you want notified  
Location of prepared statement, obituary, etc. (if any)  
Location of instructions for memorial service (or include in this document)

Padlock combinations (if needed)  
Bikes, gates, storage units, etc.

Location of jar of keys. Do everyone a favor and label each key.

If you give annual or monthly contributions to a charity, religious organization, or other group, list them and provide contact information

## **IMPORTANT DOCUMENTS AND PAPERS** | [Top](#)

Here's a list to get you started. This list will not include every document for every person. Make your own list using this as a start. For some documents, a photocopy is sufficient, but you will need originals of some of them.

These documents are stored in the following locations: (list them here) and include any safe combinations, locations of keys, etc. in order to access them.

Originals of:

Checkbook with at least 20 unused checks  
Passport (if you have one)  
Naturalization papers or green card (permanent resident status card)  
Immigration documents, if applicable  
Birth certificate  
Social Security card  
Marriage certificate, if applicable  
Divorce final papers, if applicable  
Depending on your circumstances, death certificate of spouse, child or other relative  
Will or living will  
Trust documents  
Power of attorney forms  
Nomination of conservator form (if not included in power of attorney form)  
Voter ID card (if your state requires one)  
Stock and bond certificates (consider converting them to electronically-held shares, preferably through your brokerage account, or through the company's transfer agent)  
Ownership certificates for cars and boats, also called a "pink slip"

Escrow papers, grant deeds, and other documentation on purchase or sale of home  
Change of name papers filed with the courts (if you legally changed your name)

Copies are usually sufficient for:

- Durable power of attorney for medical care
- POLST (medical directive form)
- Drivers license or state ID card (some circumstances might require original)
- Tax returns for the past 7 years
- List of usernames and passwords
- Divorce papers, including property settlement agreement
- Military service records
- Adoption papers
- Veterans discharge papers and other military service records
- Receipts, list or spreadsheet of home improvements to justify increased basis of house for sale purposes
- Business records including business tax returns, insurance, and business licenses
- Gun license (if required by state)
- Medical insurance ID card(s)
- Auto insurance ID card
- Documentation of professional certification (CPA, RN, licensed beautician, professional engineer, etc.)
- If you are a recent college graduate, diploma and transcript.
- Name change document if you legally changed your name

This list was compiled by Sue Kayton, [kayton@alum.mit.edu](mailto:kayton@alum.mit.edu)

Please email me with suggestions for how to make this list more complete and easy to use.

For information on how to back up your computer, visit [www.suekayton.com/backupbible.htm](http://www.suekayton.com/backupbible.htm)