



PERSONAL DATA WORKSHEET

This information is the starting point of your financial plan. It can also be a useful reference if you or someone else needs to manage your affairs following a natural disaster or other emergency.

(Note: Guard this securely if you include data like social security and account numbers or leave those sections blank.)

YOURSELF			
Full Name:		Social Security No.:	
Address:		Date of Birth:	
Phone:	Cell:	Email:	
Employer:		Work Phone:	
Other:			
YOUR SPOUSE			
Spouse Name:		Social Security No.:	
Address:		Date of Birth:	
Phone:	Cell:	Email:	
Employer:		Work Phone:	
Other:			
YOUR DEPENDENTS			
Name:	Relationship:	Date of Birth:	Soc. Security No.:
IMPORTANT CONTACTS			
Person:	Name:	Phone Number:	
Emergency Contact 1:			
Emergency Contact 2:			
Family Doctor:			
Family Doctor:			
Clergyman:			
Clergyman:			
Financial Planner:			
Tax Advisor/Accountant:			
Lawyer:			
Insurance Agent:			
Executor:			
Children's Guardian:			
Other:			

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Bank Accounts (checking, savings, money market, etc.)

Institution Name:	Phone Number:	Type of Account:	Account Number:

Retirement Accounts (401k, 403b, TSP, IRA, etc.)

Institution Name:	Phone Number:	Type of Account:	Account Number:

Investment Accounts (Stocks, bonds, mutual funds, etc.)

Institution Name:	Phone Number:	Type of Account:	Account Number:

Loans and Credit Cards

Institution Name:	Phone Number:	Type of Account:	Account Number:

Insurance

Insurer:	Phone Number:	Type of Insurance:	Account Number:
		Health	
		Auto	
		Life	
		Life	
		Homeowners/Renters	
		Liability	
		Disability	
		Long Term Care	

Estate Planning Documents

Document:	Location:	Date:
Will or Living Trust:		
Financial Power of Attorney:		
Living Will:		
Health Care Power of Attorney:		

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