



Key Records and Contact Information

Household Identification		Number of Household Members:			List type of attached document(s):
Last Name	First Name	Phone Number	Date of Birth	Copy of Driver's License/ID Card, Social Security Card, Passport, Birth Certificate	

Emergency Contacts				
Last Name	First Name	Phone Number	Relationship	Email Address

Financial Documentation				
Institution (Bank, Investment Account, Retirement Account, etc.)	Type of Account (Checking, Savings, Credit Card, Mortgage, etc.)	Account Number	Website	Login Information or Phone Number

Insurance Policies

Institution Name	Type of Insurance (Health, Life, Homeowners, etc.)	Account Number	Website	Login Information or Phone Number

Financial Obligations

Account (Utility Services, Property Tax, etc.)	Type of Account	Account Number	Website	Login Information or Phone Number

Legal Documents

Institution Name (Attorney or Account Office, etc.)	Type of Document (Tax Statements, Power of Attorney, Will, etc.)	Phone Number	Website	Login Information or Phone Number

Medical Information

Office Name	Physician Name	Phone Number	Website	Additional Health Information

***Attach copies of important documents: Identification Cards, Insurance Cards, Credit Cards, Financial and Legal Documents, and Health Information.**