

Family Record

| Family Member Name | Birth Date | Location of Birth Certificate* | Social Security Number | Location of Social Security card* |
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* Because of the threat of identity theft, carry your Social Security card only when needed for employment and to register for benefits. Keep your Social Security card number and birth certificates in a safe-deposit box at a financial institution or in a fireproof, waterproof and burglarproof home safe.

Important Advisers and Contacts

| Type | Name | Address | Telephone or Email Address |
|--|------|---------|----------------------------|
| Attorney | | | |
| Executor/trix of my will | | | |
| Executor/trix of will for spouse/partner | | | |
| Religious adviser | | | |
| Primary-care doctor | | | |
| Other doctors | | | |
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| | | | |
| Dentist | | | |
| Accountant or tax adviser | | | |
| Stockbroker/investment adviser | | | |
| Banker or trust officer(s) | | | |
| Employer or personnel manager | | | |
| Business manager or business partner | | | |
| Life insurance agent | | | |
| Home insurance agent | | | |
| Auto insurance agent | | | |
| Child/adultcare provider | | | |
| Neighbor or close friend | | | |
| Parents – maternal | | | |
| Parents – paternal | | | |
| Guardian of children | | | |
| Children’s school contacts | | | |