

Easy Life Planner Series

Family Information Starter Checklist

START HERE

This checklist is designed to help you begin organizing essential information for yourself and your family. Completing even part of this document can reduce stress, improve communication, and provide peace of mind during unexpected situations.

1. PERSONAL PROFILE

Full Name: _____

Date of Birth: _____

Address: _____

Phone Number: _____

Email Address: _____

2. KEY CONTACTS

Primary Contact

Name: _____

Relationship: _____

Phone: _____

Secondary Contact

Name: _____

Relationship: _____

Phone: _____

3. MEDICAL OVERVIEW

Primary Physician: _____

Phone: _____

Medical Conditions:

Current Medications:

Allergies / Special Notes:

4. IMPORTANT DOCUMENTS

Record where essential documents are kept:

Identification (Driver's License / ID): _____

Social Security Information: _____

Insurance Policies: _____

Will or Estate Documents: _____

Power of Attorney: _____

5. FINANCIAL SNAPSHOT

Primary Bank / Institution: _____

Financial Advisor (if applicable): _____

Important Accounts / Notes:

6. ADDITIONAL NOTES

NEXT STEP

This checklist is a starting point. For a more complete system to organize and manage important life information, explore the full Easy Life Planner Series.

Part of the Easy Life Planner Series

EasyLifePlanner.com