



**WEALTH** FACTORY

# Family Information Booklet

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## Personal Information

Your Information	
Name	
Maiden Name	
Social Security #	
Date of Birth	
Place of Birth	
Spouse's Information	
Name	
Maiden Name	
Social Security #	
Date of Birth	
Place of Birth	

## Family Directory

Name		Name	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
Personal Phone		Personal Phone	
Work Phone		Work Phone	
Email		Email	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Relationship		Relationship	
Name		Name	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
Personal Phone		Personal Phone	
Work Phone		Work Phone	
Email		Email	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Relationship		Relationship	
Name		Name	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
Personal Phone		Personal Phone	
Work Phone		Work Phone	
Email		Email	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Relationship		Relationship	

## Professional Directory

Attorney		Accountant	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	
Executor of Will		Employer	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	
Financial Advisor		Primary Doctor	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	
Financial Advisor		Other:	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	
Insurance Agent		Other:	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	
Insurance Agent		Other:	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Work Phone	
Email		Email	

### Financial Information

Institution Name	Account #	Account Type	Names on Account	Password/PIN

### Credit Cards

Issued By	Card Name	Account #	Password/PIN	Lost or Stolen Call:

### Loan Information

Institution/Credit Card:	
Address	
Phone	
Account #	
Contact Person	
Collateral	
Loan Term	
Payroll Date	
Life/Disability Included	<input type="checkbox"/> Yes <input type="checkbox"/> No
Copy of Loan Document	<input type="checkbox"/> Yes
Location of Document	
Institution/Credit Card:	
Address	
Phone	
Account #	
Contact Person	
Collateral	
Loan Term	
Payroll Date	
Life/Disability Included	<input type="checkbox"/> Yes <input type="checkbox"/> No
Copy of Loan Document	<input type="checkbox"/> Yes
Location of Document	

Institution/Credit Card:	
Address	
Phone	
Account #	
Contact Person	
Collateral	
Loan Term	
Payroll Date	
Life/Disability Included	<input type="checkbox"/> Yes <input type="checkbox"/> No
Copy of Loan Document	<input type="checkbox"/> Yes
Location of Document	
Institution/Credit Card:	
Address	
Phone	
Account #	
Contact Person	
Collateral	
Loan Term	
Payroll Date	
Life/Disability Included	<input type="checkbox"/> Yes <input type="checkbox"/> No
Copy of Loan Document	<input type="checkbox"/> Yes
Location of Document	

Personal Insurance			
Medical		Medical	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Phone	
Email		Email	
Policy #		Policy #	
Login Info		Login Info	
Dental		Vision	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Phone	
Email		Email	
Policy #		Policy #	
Login Info		Login Info	
Life		Life	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Phone	
Email		Email	
Policy #		Policy #	
Login Info		Login Info	

Disability/Accident		Disability/Accident	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Phone	
Email		Email	
Policy #		Policy #	
Login Info		Login Info	
Long Term Care		Long Term Care	
Name		Name	
Address 2		Address 2	
Address 3		Address 3	
Phone		Phone	
Email		Email	
Policy #		Policy #	
Login Info		Login Info	

Auto Insurance	
Company	
Type	<input type="checkbox"/> Group <input type="checkbox"/> Individual
Agent	
Phone	
Policy/Certificate #	
Type of Coverage	
Make/Model/Year	VIN#
Copy of Policy	<input type="checkbox"/> Yes <input type="checkbox"/> No
Location of Policy	
Homeowner/Renter Insurance	
Company	
Type	<input type="checkbox"/> Group <input type="checkbox"/> Individual
Agent	
Phone	
Policy/Certificate #	
Type of Coverage	
Copy of Policy	<input type="checkbox"/> Yes <input type="checkbox"/> No
Location of Policy	
Umbrella Policy/General Liability Insurance	
Company	
Type	<input type="checkbox"/> Group <input type="checkbox"/> Individual
Agent	
Phone	
Policy/Certificate #	
Type of Coverage	
Copy of Policy	<input type="checkbox"/> Yes <input type="checkbox"/> No
Location of Policy	

Retirement Plans/Investments			
401k/403b		401k/403b	
Employer		Employer	
Phone#		Phone#	
Financial Institution		Financial Institution	
Phone #		Phone #	
Account #		Account #	
Login Info		Login Info	
Open Loans	[ ] Yes [ ] No	Open Loans	[ ] Yes [ ] No
Beneficiaries:		Beneficiaries	
IRA Account		IRA Account	
Type:	[ ] Traditional [ ] Roth	Type:	[ ] Traditional [ ] Roth
	[ ] Rollover [ ] Educ		[ ] Rollover [ ] Educ
Financial Institution		Financial Institution	
Phone #		Phone #	
Account #		Account #	
Login Info		Login Info	
Open Loans	[ ] Yes [ ] No	Open Loans	[ ] Yes [ ] No
Beneficiaries:		Beneficiaries:	
IRA Account		IRA Account	
Type:	[ ] Traditional [ ] Roth	Type:	[ ] Traditional [ ] Roth
	[ ] Rollover [ ] Educ		[ ] Rollover [ ] Educ
Financial Institution		Financial Institution	
Phone #		Phone #	
Account #		Account #	
Login Info		Login Info	
Open Loans	[ ] Yes [ ] No	Open Loans	[ ] Yes [ ] No
Beneficiaries:		Beneficiaries:	

# Document Locator

*It is not recommended that original copies of your most valuable/important and hard to replace documents be kept in this notebook. Some you may want to consider storing in a fireproof safe at home, at an attorney's office or in a safe-deposit box. This chart will help serve as a reminder of where the originals are stored.*

Document	Location	Notes
Adoption Papers		
Birth Certificates		
Burial/Funeral		
Child Support Orders		
Citizenship Papers		
Death Certificates		
Divorce Decree		
Education Degrees/Diplomas		
Health Care Power of Attorney		
Household Inventory		
Home Ownership Title/Deeds		
Investment Certificates		
Marriage Certificate		
Military Service Records		
Power of Attorney		
Social Security Cards		
Tax Records		
Vehicle Titles		
Wills/Trusts		