

## **Family Business Information**

Be sure at least two responsible people know where to find this information and keep it updated. (This information is not in any priority order, as it's all important to have.) Our list is in three columns:  
the PERSON/ OFFICE, next the PHONE NUMBER AND ADDRESS, then any relevant COMMENTS. This information is not only for the benefit of executors; it's very handy if any of this information is lost or stolen, as well.

- Family members: Who is the "go-to" person, executor; where is your address book
- Your church
- Lawyer/ law office
- Financial advisor or business manager
- Life insurance company, agent, policy number(s) and where to locate the actual policy
- Other insurances, such as car, umbrella, on all properties and cars
- Any other insurance brokers/policies, such as long- or short-term care
- Health insurance/ broker
- Accountant
- All doctors
- All utilities, with account number
- Mortgage company and account number
- Alarm company, alarm code, and special code word for any emergency calls
- Your housekeeper or other home services, such as lawn care
- All credit cards: number, security code, expiration date
- Your Medicare ID/ location of the card
- Your Social Security number and location of the original card
- Your drivers' license (copy) and number
- Your passport number and it's location
- Passwords to EVERYTHING; where are they, what are they
- Location of your checkbooks, account numbers, name of the bank
- Note of what expenses are automatically debited for any account, and which ones
- Note of which income is automatically deposited, and in which account
- Any other membership information: AARP, AAA, Voter ID

*Let us know if we forgot something! Next week, a list of documents.*