



# Contact and Financial Information Worksheet

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Use this worksheet to gather all of your important information in one place. By filling out the details regarding your key contacts, as well as medical, financial and legal information, you and your family members will always know where to find your vital information. Give a copy to a family member and/or your emergency contact.

Name

Address

Home phone

Business phone

Cell phone

Date of birth

Social Security number

## Emergency contacts

**Name/Relationship**

Telephone and address

**Name/Relationship**

Telephone and address

**Family confidant**

Telephone and address

## Neighbors

**Name**

Telephone and address

**Name**

Telephone and address



This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

## Contact and Financial Information Worksheet

### Health care

#### Employer

Firm

Address and main telephone

Emergency contact at work (name and telephone)

#### Insurance

Insurer

Policy number

Medicare/Medicaid

Policy number

#### Doctors

##### Primary care physician

Name/Practice name

Address and telephone

##### Other doctors: Specialty

Name/Practice name

Address and telephone

##### Specialty

Name/Practice name

Address and telephone

##### Specialty

Name/Practice name

Address and telephone

#### Clinic or health center

Type of treatment

Name/Practice name

Address and telephone

## Contact and Financial Information Worksheet

### Legal/Financial/Estate contacts

#### Pharmacy

Name and address

Location of/Contact for medications list

- Up-to-date list of medications (including drug names, dosages, location of/contact for medications list, what for and prescribing doctor)

#### Attorney

- Has copy of last will and testament

Firm/Address/Telephone

#### Accountant

Firm/Address/Telephone

#### Tax preparer

Firm/Address/Telephone

#### Investment professional

Firm/Address/Telephone

#### Tax advisor

Firm/Address/Telephone

#### Insurance agent

Firm/Address/Telephone

#### Estate trustee

Name(s)/Address/Telephone

#### Estate executor(s)

Name(s)/Address/Telephone

#### Guardian(s) for children

Name(s)/Address/Telephone

#### Power of attorney

- Has advance medical directives (e.g., living will)

Name/Address/Telephone

## Contact and Financial Information Worksheet

### Financial portfolio

#### Prearranged funeral/burial

Funeral home

Contact

#### Other

Short-term reserves	Institution	Account number
Checking accounts		
Savings accounts		
Money market mutual funds		
Certificates of deposit (CDs)		
US Treasury bills		
Credit cards		

## Contact and Financial Information Worksheet

### Financial portfolio (cont.)

#### Investments

Brokerage

Mutual funds	Institution	Account number

Corporate stock - in 401(k)

Corporate stock options

Retirement accounts	Institution	Account number
Traditional IRA		
Roth IRA		
Keogh account		
401(k) plans		
403(b) plans		
Profit-sharing plan		
Pension plans		

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### Financial portfolio (cont.)

Retirement accounts (cont.)	Institution	Account number
Annuities		
Other		
College savings plans		
Beneficiary		
Beneficiary		
Beneficiary		
Beneficiary		
Beneficiary		
<input type="checkbox"/> Additional (see separate page)		
Military benefits	Institution	Account number
Insurance		
Life		
Disability		
Long-term care		
Auto		
Homeowner's		
Umbrella		
Other		

## Contact and Financial Information Worksheet

Personal property	Institution	Account number
Mortgage		
Safe deposit box		
Business/Partnership		
Car/Truck/Boat		
Name/make of car		
License number		
Loans		

Contact your financial advisor or other investment professional for more information or visit [mfs.com](https://mfs.com).

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