



# Essential Family Preparedness Workbook

Centralize important documents and information for your family and loved ones. This document will be a critical resource in the event of an emergency or major life event.

This checklist is designed to help organize important information so that you are better prepared for future life stages and unforeseen circumstances.



**Key Information**



**Essential Documents**



Medical Information



Financial Information



Digital & Professional Information

## Key Information



Make sure that your loved ones know where to find your key personal information in the event of an emergency. Attach copies of all key documents to this section.



# PERSONAL INFORMATION

## MY INFORMATION

FULL LEGAL NAME: \_\_\_\_\_

GIVEN / MAIDEN NAME (if applicable): \_\_\_\_\_

SOCIAL SECURITY NUMBER: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

PLACE OF BIRTH (hospital, city, county, state/country):  
\_\_\_\_\_

MOTHER'S FULL LEGAL NAME: \_\_\_\_\_

MOTHER'S PLACE OF BIRTH (city & state/country): \_\_\_\_\_

FATHER'S FULL LEGAL NAME: \_\_\_\_\_

FATHER'S PLACE OF BIRTH (city & state/country): \_\_\_\_\_

PASSPORT NUMBER: \_\_\_\_\_ EXPIRATION DATE: \_\_\_\_\_

FULL NAMES OF ALL CHILDREN (living & deceased):

CURRENT EMPLOYER (name, address, phone, manager):

PETS:

# EMERGENCY CONTACTS

Information last updated:

| CONTACT             | NAME | PHONE OR EMAIL |
|---------------------|------|----------------|
| EMERGENCY CONTACTS: |      |                |
| PRIMARY DOCTOR:     |      |                |
| DOCTOR/ SPECIALIST: |      |                |
| CLERIC:             |      |                |
| ATTORNEY:           |      |                |
| FINANCIAL ADVISOR:  |      |                |

## EMERGENCY CONTACTS

Information last updated:

| CONTACT  | NAME | PHONE OR EMAIL |
|--|------|----------------|
| PROPERTY & CASUALTY AGENT:                         |      |                |
| CPA:   |      |                |
| EXECUTOR:  |      |                |
| TRUSTEE:   |      |                |
| SUCCESSOR TRUSTEE:                                 |      |                |
| OTHER<br>(Power of Attorney,<br>Healthcare Proxy): |      |                |

# PROFESSIONAL DIRECTORY

ATTORNEY, CPA, MECHANIC, HOUSEKEEPER, NANNY, PET SITTER, LANDSCAPING & POOL SERVICES...

Information last updated:

| NAME | BUSINESS TYPE | ADDRESS | PHONE OR EMAIL |
|------|---------------|---------|----------------|
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |
|      |               |         |                |



**AssetMark, Inc.**

1655 Grant Street  
10th Floor  
Concord, CA 94520-2445  
800-664-5345

**IMPORTANT INFORMATION**

This is for informational purposes only, is not a solicitation, and should not be considered investment or tax advice. This information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed, and is subject to change.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission. AssetMark and third-party strategists and service providers are separate and unaffiliated companies.

©2020 AssetMark, Inc. All rights reserved.

84789 | M20-89941 | 03/2020 | EXP 03/31/22