

PRIVATE PERSONAL INFORMATION PROFILE

One of Five Documents Every Adult Needs

*POA * HCPOA/AD *HIPAA *WILL*PIIP*

Who

Me: name, also known as & nicknames, address, SS# , tele & cell phone #

Family: Parents, spouse, children, siblings -- Family Tree

Support : Church, Friends, Pastor, Doctors, Neighbors, Tax Preparer, Financial Advisor

Others: Employer, Employees, Prior Spouse

Where

Birthplace

Places lived

Schools

Work

What

Assets

Debts

Insurances: life, health, disability, homeowners, auto, long term care, casualty

Access

Email and PW

Cell Phone

Online accounts: User Names, Emails, PW, PINs, other authentications

Commonly asked Q&A: eg, mother's maiden name, high school, etc.

Document Copies:

SS card

Driver's License or Real ID

Passport

Proof of residency – bills, statements

Birth certificate

Marriage license

Divorce Decree

Death certificate of spouse

Current bank and financial statements

Deeds and Payoff Statement

DD214

Last 3 year tax returns with attachments or 1099s

Photos of home contents

Final Arrangements

Burial/cremation

Funeral/memorial service

Who/where

Obituary

Create a secured file & update regularly

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