

**PERSONAL & ESTATE INFORMATION SHEET**  
**(Keep this information in a safe place with your Will or Trust  
and/or provide to Family/Agent/Personal Representative)**

1. Full Name:
  
2. Spouse's Name:
  
3. Current address:
  
4. County and state of residence:
  
5. Mailing address (if different):
  
6. Former states of residence:
  
7. Telephone numbers:
  - a. Home:
  - b. Mobile:
  - c. Business:
  - d. Other:
  
8. Social security number:
  
9. Date of birth:
  
10. Date and place of marriage:
  
11. Prior marriages:

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12. State of health/special considerations:

13. Children's names, addresses and birth dates:

CAUTELA

14. Children and special considerations (education; disabilities; special needs):

CORPORATION

15. Names of deceased children and dates of death:

16. Other dependents (name, relationship, address and birth date):

17. Grandchildren:

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18. Parents (name and address):

19. Brothers and sisters (names and addresses):

CAUTELA

20. Military Service:

- a. Branch:
- b. Date of discharge:
- c. Location of discharge papers:

CORPORATION

21. Location of safe deposit box:

22. Location of important papers (prenuptial agreements, divorce decree, deeds, will, trust, contracts, titles to real estate or cars, etc.):

23. Location of log-in and password information for accounts which you access on-line only and/or have elected not to receive paper statements.

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24. Prior Wills:

25. Advisors:

a. Accountant's name, address, phone:

b. Insurance agent's name, address, phone:

c. Investment/Financial advisor or Broker's name, address, phone:

d. Attorney's name, address, phone:

e. Other:

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26. Employment:

a. Company:

b. Address:

c. Phone:

d. Title/Position:

27. Spouse's employment:

a. Company:

b. Address:

c. Phone:

d. Title/Position:

28. If self-employed or close corporation, llc, other:

a. Business continuation agreement:

b. Buy-Sell agreement:

29. Employment benefits:

30. Spouse's employment benefits:

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31. Income (salary, other income):

32. Spouse's income (salary, other income):

33. Personal representative (executor) name, address, phone:

34. Alternate personal representative (executor) name, address, phone:

35. Guardian nominee name, address, phone:

36. Alternate guardian nominee name, address, phone:

37. Notes regarding funeral arrangements or wishes:

38. Notes regarding anatomical gifts for medical purposes:

39. Other: