

## Notes

This book was designed by Texas Attorney Elisse V. Woelfel to assist individuals with creating an inventory of their assets, insurance, debts, and other important information. When you are no longer able to manage your personal and business affairs due to disability or death, this information will provide a guide to the people who will be acting on your behalf. Once completed the information should be kept in a secure location where only trusted family members or friends have access.

The information should be updated regularly, so please consider using a pencil when completing the book or you may contact Ms. Woelfel at [elisse@elisselaw.com](mailto:elisse@elisselaw.com), if you would like a digital version, which can be easily updated

Compliments of:

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The Law Office of Elisse V. Woelfel, P. C.

## Personal Information

Notes

Name	
Address	
Telephone	
Social Security No.	
Date of Birth	

Spouse's Name	
Address	
Telephone	
Social Security No.	
Date of Birth	

Notes

### Child & Dependent Information

Name and Date of Birth	Address	Phone

Notes







### Electronic Access

Video Accounts (Netflix, Hulu, YouTube, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

Cloud Storage and Backup Accounts (Carbonite, Dropbox, Google Drive, Etc.)		
Web Address	User Name or Email	Password and Security Q&A

### Advisors (Spiritual, Attorney, CPA, Etc.)

Type of Advisor:
Name:
Address:
Phone and Email:

Type of Advisor:
Name:
Address:
Phone and Email:

Type of Advisor:
Name:
Address:
Phone and Email:

Type of Advisor:
Name:
Address:
Phone and Email:













## Electronic Access

Electronic Devices (Computer, Tablet, Phone, Etc.)		
Device	User Name	Password

Notes

## Insurance

Medical Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:

Prescription Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:

Supplemental Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:

Dental Insurance:
Policy Number:
Insured:
Claims Address and Phone Number:





## Insurance

AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

AD&D Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

## Insurance

Other Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Other Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

## Notes



## Insurance

Short Term Disability Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Long Term Disability Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Long Term Disability Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

## Insurance

Long Term Care Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Long Term Care Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone:

Short Term Disability Insurance:
Insured:
Policy Limits:
Policy Number:
Agent's Address and Phone: