# Quick Contacts

Provide a copy of this section along with your power of attorney documents and living will to your agents, attorney-in-facts, successor trustees and others who may need this contact information readily available. As contact information changes, provide updates to those you have previously received this information.

To quickly update others: highlight this section, copy and paste into an email and send to the recipient, who then has both an electronic and physical copy.

If those named as agents, attorney-in-facts, executors, personal representatives and successor trustees are listed as “Co-“ rather than linear (1st, 2nd, 3rd), change the designation. If needed, add a 4th person.

Place a copy of these documents with your estate planning documents.

Your name:

Phone:

Address:

# Financial Power of Attorney Agents / Attorney-in-Facts

1st:

Phone:

Email:

Relation:

Address:

2nd:

Phone:

Email:

Relation:

Address:

3rd:

Phone:

Email:

Relation:

Address:

# Executors / Personal Representatives / Successor Trustees:

1st:

Phone:

Email:

Relation:

Address:

2nd:

Phone:

Email:

Relation:

Address:

3rd:

Phone:

Email:

Relation:

Address:

Location of last will & testament and/or living trust (if applicable):

# Medical Power of Attorney Agents:

1st:

Phone:

Email:

Relation:

Address:

2nd:

Phone:

Email:

Relation:

Address:

3rd:

Phone:

Email:

Relation:

Address:

Primary physician name:

Address and phone:

# Emergency Contacts

Name 1st:

Phone:

Email:

Address:

Relationship:

Name 2nd:

Phone:

Email:

Address:

Relationship:

Name 3rd:

Phone

Email:

Address:

Relationship:

# Family Contacts

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Friends to Contact

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Employment Contacts

Name:

Company:

Phone:

Email:

Address:

Relationship:

Name:

Company:

Phone:

Email:

Address:

Relationship:

Name:

Company:

Phone:

Email:

Address:

Relationship:

# Beneficiary Contact Information

**If listing a charity, include a website address.**

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

Name:

Phone:

Email:

Address:

Relationship:

# Additional Contacts

Property and Casualty Insurance Agent

Name:

Company:

Phone:

Email:

Address:

Life Insurance Agent

Name:

Company:

Phone:

Email:

Address:

Financial Advisor 1

Name:

Company:

Phone:

Email:

Address:

Estate Planner

Name:

Company:

Phone:

Email:

Address:

Accountant

Name:

Company:

Phone:

Email:

Address:

Lender

Name:

Company:

Phone:

Email:

Address:

Realtor

Name:

Company:

Phone:

Email:

Address:

Electricity

Name:

Company:

Phone:

Email:

Address:

Phone / Cell Phone Provider

Name:

Company:

Phone:

Email:

Address:

Cable / Internet Provider

Name:

Company:

Phone:

Email:

Address:

# Businesses Owned

Talk to an attorney or accountant regarding your business succession plans. Whatever you succession plan does not cover, list the information here.

**Name:**

**Type:**

**Buy/Sell in place?**

**Partners:**

**Important contacts:**

**List of assets:**

**Bank accounts:**

**Instructions:**

**Name:**

**Type:**

**Buy/Sell in place?**

**Partners:**

**Important contacts:**

**List of assets:**

**Bank accounts:**

**Instructions:**