

**PERSONAL DIRECTORY**

A Personal Directory lists each family member and friend whom you would want notified in the event of an emergency or death in your family. For those people who function as executors, and financial and/or medical proxies, consider including birthdates and Social Security numbers. Providing military discharge numbers of immediate family members who are Veterans will help should you or your proxy need to apply for benefits. Keep this information safely secured, but do share it with your closest contacts.

**Sample Personal Directory for Joe and Gina Smith**

**Joseph Michael Smith**

Address  
 Social Security #  
 Home Phone  
 Work Phone  
 Cell Phone  
 Birthdate, Location  
 Wedding Date, Location  
 Employer

**Gina Jones Smith**

Address  
 Social Security #  
 Home Phone  
 Work Phone  
 Cell Phone  
 Birthdate, Location  
 Wedding Date, Location  
 Employer

**Oldest Son (Executor)**

Name (Spouse name)  
 Address  
 Phone  
 Social Security #  
 Birthdate, Birthplace

**Youngest Son (Medical Power of Attorney)**

Name (Spouse Name)  
 Address  
 Phone  
 Social Security #  
 Birthdate, Birthplace

**Oldest Daughter (Financial Power of Attorney)**

Name (Spouse Name)  
 Address  
 Phone  
 Social Security #  
 Birthdate, Birthplace

**Joe's Family**

**Parents Names**

Address  
 Phone

**Name**

Address  
 Phone

**Name**

Address  
 Phone

**Name**

Address  
 Phone

**Gina's Family**

**Parents Names**

Address

Phone

**Name**

Address

Phone

**Name**

Address

Phone

**Name**

Address

Phone

**Friends of Joe and Gina**

**Name**

Address

Phone

**Name**

Address

Phone

**Name**

Address

Phone

**Name**

Address

Phone

**PROFESSIONAL DIRECTORY**

A Professional Directory lists contact information that would be useful should you or your family member die or become incapacitated.

**Sample Professional Directory**

**Joe’s Primary Physician**

Name  
Affiliated Office  
Address  
Phone

**Gina’s Primary Physician**

Name  
Affiliated Office  
Address  
Phone

**Joe’s Dentist**

Name  
Address  
Phone

**Gina’s Dentist**

Name  
Address  
Phone

**Joe’s Employer**

Organization  
Contact Name  
Address  
Phone

**Gina’s Employer**

Organization  
Contact Name  
Address  
Phone

**Attorney**

Name/Firm Name  
Address  
Phone

**Banker**

Bank  
Address  
Phone

**Financial Advisor**

Name/Firm  
Address  
Phone

**Accountant**

Name/Firm  
Address  
Phone

**Clergy**

Name  
Faith Organization Name  
Phone

**Real Estate Agent**

Name/Company  
Address  
Phone

**Funeral Director**

Name/Funeral Home  
Address  
Phone