

Staying prepared

Keep your important contacts and financial information up to date



Take action today to consolidate essential personal, medical, financial and family information, so that it's current and readily available when you need it.

Once you've completed this document, store it in a secure place and let your family members know where it's kept.

You

Full Legal Name _____ Cell Phone _____

Address _____

Social Security # _____ Birth Date _____

Driver's License # _____ Passport # _____

Primary Care Physician _____ Phone # _____

Health Insurance Provider _____ ID # _____

Allergies _____ Blood Type _____

Medications and Dosage _____

Dentist _____ Phone # _____

Employer _____ Phone # _____

Employer address _____

Your spouse

Full Legal Name _____ Cell Phone _____

Address _____

Social Security # _____ Birth Date _____

Driver's License # _____ Passport # _____

Primary Care Physician _____ Phone # _____

Health Insurance Provider _____ ID # _____

Allergies _____ Blood Type _____

Medications and Dosage _____

Dentist _____ Phone # _____

Employer _____ Phone # _____

Employer address _____

Emergency contacts

Name _____ Relationship _____

Home Phone # _____ Cell Phone # _____

Name _____ Relationship _____

Home Phone # _____ Cell Phone # _____

Your children or grandchildren

Name _____

Social Security # _____

School Name _____

School Phone # _____

Teacher _____

Grade _____

Health Insurance Provider _____

ID # _____

Medications and Dosage _____

Passport # _____

Allergies _____

Blood Type _____

Your children or grandchildren

Name _____

Social Security # _____

School Name _____

School Phone # _____

Teacher _____

Grade _____

Health Insurance Provider _____

ID # _____

Medications and Dosage _____

Passport # _____

Allergies _____

Blood Type _____

Your children or grandchildren

Name _____

Social Security # _____

School Name _____

School Phone # _____

Teacher _____

Grade _____

Health Insurance Provider _____

ID # _____

Medications and Dosage _____

Passport # _____

Allergies _____

Blood Type _____

Pets

Pet Name _____

Special Considerations _____

Pet Name _____

Special Considerations _____

Pet Name _____

Special Considerations _____

Veterinarian _____

Phone # _____

Personal insurance

Life Insurance Company _____

Policy # _____

Address _____

Phone # _____

Long-term Care Insurance Company _____

Policy # _____

Address _____

Phone # _____

Disability Insurance Company _____

Policy # _____

Address _____

Phone # _____

Annuities

Annuity Provider _____

Policy # _____

Address _____

Phone # _____

Annuity Provider _____

Policy # _____

Address _____

Phone # _____

Property insurance

Homeowner's Insurance Company _____

Policy # _____

Address _____

Phone # _____

Umbrella Liability Insurance Company _____

Policy # _____

Address _____

Phone # _____

Auto Insurance Company _____

Policy # _____

Address _____

Phone # _____

Financial professional(s)

Financial Professional _____ Phone # _____

Firm Name and Address _____

Account # _____ Account # _____

Account # _____ Account # _____

Financial Professional _____ Phone # _____

Firm Name and Address _____

Account # _____ Account # _____

Account # _____ Account # _____

Other professionals

Attorney _____ Phone # _____

Firm Name and Address _____

Tax Professional _____ Phone # _____

Firm Name and Address _____

Certified Public Accountant (CPA) _____ Phone # _____

Firm Name and Address _____

Other _____ Phone # _____

Firm Name and Address _____

Other _____ Phone # _____

Firm Name and Address _____

Banking

Bank _____ Phone # _____

Address _____

Checking Account # _____ Savings Account # _____

Debit Card # _____ PIN # _____

Bank _____ Phone # _____

Address _____

Checking Account # _____ Savings Account # _____

Debit Card # _____ PIN # _____

Bank _____ Phone # _____

Address _____

Checking Account # _____ Savings Account # _____

Debit Card # _____ PIN # _____

Certificate of Deposit # _____ \$ _____

Certificate of Deposit # _____ \$ _____

Certificate of Deposit # _____ \$ _____

Certificate of Deposit # _____ \$ _____

Loans and credit cards

Mortgage Company

Phone #

Address

Account #

Interest Rate

Second Mortgage Company

Phone #

Address

Account #

Interest Rate

Home Equity Company

Phone #

Address

Account #

Interest Rate

Car Loan Company

Phone #

Address

Account #

Interest Rate

Car Loan Company

Phone #

Address

Account #

Interest Rate

Credit Card

Phone #

Address

Account #

Interest Rate

Credit Card

Phone #

Address

Account #

Interest Rate

Credit Card

Phone #

Address

Account #

Interest Rate

Emergency numbers

Police _____

Fire Department _____

Hospital _____

Family Meeting Place _____

Home repairs and other services

Plumber _____ Phone # _____

Electrician _____ Phone # _____

AC/Heating Company _____ Phone # _____

Telephone Company _____ Phone # _____

Cable Company _____ Phone # _____

Pest Control _____ Phone # _____

AAA _____ Phone # _____

Other _____ Phone # _____

Other _____ Phone # _____

Neighbors

Name _____ Phone # _____

Address _____

Name _____ Phone # _____

Address _____

Name _____ Phone # _____

Address _____

Government organizations

City Emergency Services _____ Phone # _____

State Emergency Services _____ Phone # _____

Action today can lead to a more secure tomorrow.
Action is everything.

Annuities are long-term insurance products designed for retirement. In the growth stage, they can help you build assets on a tax-deferred basis. In the income stage, they can provide you with guaranteed income through standard or optional features. Contract and optional benefit guarantees are backed by the claims-paying ability of the issuing insurer. Early withdrawals may be subject to withdrawal charges. Partial withdrawals may reduce benefits available under the contract, as well as the amount available upon a full surrender. Withdrawals of taxable amounts are subject to ordinary income tax and, if taken prior to age 59½, an additional 10% federal tax may apply. Income protection features may be standard or optional. Additional fees, withdrawal parameters and other limitations apply. Investment requirements also apply with variable annuities. Keep in mind, for retirement plans and accounts (such as IRAs and 401(k)s), an annuity provides no additional tax-deferred benefit beyond that provided by the retirement plan or account itself.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Please consult with your financial professional regarding your situation. For legal, accounting or tax advice consult the appropriate professional.

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