

Personal Information

This section covers your identity. Your full legal name, your date of birth, where you were born, and the documents that prove all of it.

Fill in what applies. If you don't have something (for example, if you've never had a passport), just write "N/A" so your executor knows you considered it.

Here's what to include:

Your full legal name. The name on your birth certificate, not the name you go by. If your legal name is "James" but everyone calls you "Jim," write James. Your executor needs the legal version for official documents.

Your date and place of birth. Day, month, year, and the town or city where you were born. This information appears on almost every legal form your executor will fill out.

Your Social Security Number (SSN). Your executor will need this to file your final tax return and deal with the IRS. Keep it somewhere secure, but make sure they can find it.

Your state ID or driver license number. Government agencies may ask for it.

Your driver license number. If you have one, include the number and the state that issued it. This helps with identification.

Your passport number. If you have a current passport (or an expired one), note the number and where it's stored. If you don't have one, write "N/A."

Birth certificates. Your own, and any for immediate family members who might be beneficiaries (your children, for example). Note where the originals are stored. If you only have copies, say so.

Marriage certificates. If you're married, your executor will need proof. If you've been married more than once, include certificates for all marriages.

Divorce or separation documents. If you're divorced, your executor needs to know. These documents affect how your estate is divided, especially if your Will was written before the divorce. Note where the originals are kept.

WHY THIS MATTERS

Without this information, your executor can't prove who you are. And if they can't prove who you are, they can't access your bank accounts, sell your property, or distribute your estate.

It's boring admin. But it's critical admin.

Fill it in, and you've just saved your executor days of searching.

Your Personal Information

Start with the basics - the first details your family will need.

YOUR PERSONAL INFORMATION

FULL LEGAL NAME

ALSO KNOWN AS

DATE OF BIRTH

format: ___ / ___ / ___

PLACE OF BIRTH

SOCIAL SECURITY NUMBER

HEALTH INSURANCE ID / MEDICARE NUMBER

DRIVER LICENSE NUMBER

STATE

PASSPORT NUMBER

COUNTRY

(Or write "N/A" if you don't have one)

PASSPORT NUMBER

additional passport entry

Your Personal Information (cont.)

COUNTRY

PASSPORT NUMBER

additional passport entry

COUNTRY

IMPORTANT DOCUMENTS

BIRTH CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

MARRIAGE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

MARRIAGE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

MARRIAGE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

Your Personal Information (cont.)

DIVORCE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

DIVORCE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

DIVORCE CERTIFICATE

Tick one: Have original / Have copy / Don't have; row: Stored at

NOTES (ANYTHING ELSE YOUR EXECUTOR SHOULD KNOW ABOUT YOUR IDENTITY)