



Power To Win:

Essential Preparation Toolkit



SESSION 1

PERSONAL INFORMATION

- Full legal name
- Address
- Legal Residence (Country)
- Social Security Number
- Date Of Birth
- Place Of Birth
- Location of Birth Certificate
- Copy of Adoption Decree (if applicable)
- Passport Number and Passport Location
- Drivers License Number
- Health Information: Blood type; Allergies
- Marital Status
- Name Of Spouse(s), (if applicable)
- Certificate of Marriage, Divorce Decrees
- Death Certificate of Spouse(s) (if Applicable)
- Emergency Contact-Name, Relationship, Telephone Number
- Names of Children , Addresses, Telephone Numbers (If applicable)



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PERSONAL INFORMATION

- Names of Deceased Children (if applicable)
- Legal Guardianship Documents (If applicable)
- Immigration or Citizenship Documents (i.e. green card, visa, naturalization certificate)
- Employment History: Name of Employer(s); Dates of Employment
- Business Records Location
- Safe Deposit Box location, Number and Key
- Educational Background- Degrees Conferred and Dates(s)
- Military Background – Branch of Service; Rank; & other applicable Military records
- Religious Preference
- Names and Telephone Numbers of Religious Contacts
- Group and Organization Memberships; Awards Received
- Financial and Tax Records
- Property and Ownership Documents
- Health and Insurance Records Location
- Names and Telephone Numbers of Close Friends, Relatives
- Name and Telephone Number of Doctors, Lawyers and Financial Advisors