

**THE BOOK**

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Margy Campbell, LCSW, CFP, Master Guardian  
Guardian & Conservator Services, LLC  
Age Connections, Inc.

801-281-1100

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**Emergency Contacts**

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Contact Information for:

Family, Neighbors, Religious Contact  
Physician, Hospital of Preference

Put on the front of THE BOOK  
And on the refrigerator and bedroom door

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Funeral, Burial & Obituary Information  
Miscellaneous Information  
Advisors

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**Chapter 1**

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**Demographic & Family Information**

Full Name, Maiden Name, Aliases  
Mother & Father's Name  
Marriages, Births  
Date of Birth, SSA number  
Place of Birth, Siblings  
Work History, Previous Addresses

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**Chapter 2**

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**Medical/Dental/Medication History**

Medical Diagnosis, Previous Surgeries  
Previous & Current Medication List  
**Allergies**  
Physicians/Dentist Names & Contact Information  
Hospital Preference

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**Chapter 3**

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**Property Information**

Collectibles, Jewelry  
Home, Condo, Vacation Property  
Cars, Trucks, Boats, RV's and Campers  
List of Repair People, Lock Box for All Keys

Get Pictures if Possible

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**Chapter 4**

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**Insurance Information**

Homeowners  
Special Policies for Jewelry/Collectibles  
Additional Liability Coverage Policies

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**Chapter 5**

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**Business Information**

Business Documents  
Buy/Sell Agreements  
Other Agreements Specific to the Business

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**Chapter 6**

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**Financial Information**

Bank Accounts - Location and Account Numbers  
Pensions, 401K, IRS's, Investment Portfolios  
Mortgages, Credit Card Debt  
Outstanding Debts to Others, Debts Owed to You  
Tax Information - 5-7 years

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**Chapter 7**

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**Legal Information**

Will and Trust Documents  
Financial/Medical Powers of Attorney  
Business Documents

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**Chapter 8**

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**Funeral, Burial & Obituary**

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**Chapter 9**

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**Miscellaneous Information**

Veterinarian, Pet Information  
Hobbies, Travels, Beautician  
Neighbors, Religious Community

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**Chapter 10**

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**Advisors**

Attorney, CPA/Accountant  
Banker, Key Family Member  
Insurance and Investment Advisor

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**THANKS!!**

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