

Preparing for a Crisis — A Quick Reference Guide

Some conversations can be difficult to have, but it is important to speak to your loved ones about what to do should the worst happen. It's also important to keep detailed records that will make things easier for them in case of emergency. Making a list of documents and accounts (including where you keep them), as well as obligations, can ease the burden when you aren't there to help.



DOCUMENTS - WHAT IS IT?

WHERE IS IT?

Birth Certificate

Social Security Card

Driver's License Number

Passport

Insurance Policies

Powers of Attorney and
Beneficiary Documents

Medical Records

Wills and Trusts

Deeds, Titles, and Mortgages

Military Service Records

Tax Records

FINANCIALS - WHAT IS IT?

WHERE IS IT?

ACCOUNT # *(if applicable)*

Checking Account

Savings Account

Mutual Fund Accounts

Brokerage Accounts

Retirement Plan Accounts

Safe Deposit Box

IN CASE OF EMERGENCY

OBLIGATION - WHAT IS IT?	WHERE IS IT?	ACCOUNT # <i>(if applicable)</i>
Electricity Bill	_____	_____
Water Bill	_____	_____
Gas Bill	_____	_____
Phone Bill	_____	_____
Cell Phone Bill	_____	_____
Cable and Internet	_____	_____
Subscriptions	_____	_____
	_____	_____
	_____	_____
Charitable Donations	_____	_____
Active Loans	_____	_____

Who to Call

In addition to keeping a list of documents, accounts, and obligations, it's important to have a list of contacts and phone numbers for those that your loved ones should get in touch with in case of an emergency.



CONTACTS - WHO IS IT?	NAME	PHONE #
Doctor	_____	_____
Attorney	_____	_____
Accountant	_____	_____
Insurance Agent	_____	_____
Financial Professional	_____	_____