

In Case of Emergency - What My Family Should Know

Date this document was last updated: _____

Date I will review this document: _____ (Mark your calendar!)

In case of emergency, please notify these people:

- 1. _____
- 2. _____
- 3. _____
- = Additional info is in my Contacts list.

About me

My full legal name: _____ State of legal residence: _____
Date of birth: _____ Place of birth: _____
Spouse/Partner: _____ Location of marriage certificate: _____
Children: _____

I have created a will: Yes ☐ No ☐

My will can be found here: _____

My personal information

Social Security #: _____ Taxpayer ID #: _____
Passport #: _____ City/State of issue: _____
Expiration date: _____ I am a citizen of: _____
Location of citizenship papers/passport: _____
I have a post office box at: _____ Combination: _____

Insurance

● = Additional info is in my password program.

- Medical - _____
- Medicare ID #: _____
- Homeowners - _____
- Mortgage - _____
- Supplemental - _____
- Life - _____
- Auto - _____
- Other insurance - _____

*In your password program, title each item as follows: "Insurance-Medical-Blue Cross" or "Insurance-Auto-Allstate".
Include policy #, exact name on account & agent name (if any.)*

● = Additional info is in my password program. ●● = Additional info is in my Contacts list.

In Case of Emergency - What My Family Should Know

Professional advisors

●● Financial advisor: _____ ●● Accountant: _____

●● Attorney: _____ ●● POA: _____

I have an advanced directive Yes ☐ No ☐ ●● My health care POA: _____

I have a will Yes ☐ No ☐ ●● My Executor/Personal Rep: _____

I have a trust Yes ☐ No ☐ ●● My Trust attorney: _____

My old tax returns can be found at: _____

My personal tech information

Apple ID: _____ Apple p/w: _____

Microsoft ID: _____ Microsoft p/w: _____

The password to my computer password program is: _____

My computer login is: _____

A full computer backup (hard drive) can be found here: _____

My cell phone # and password: _____

● Email(s): _____

● Website(s): _____

Other notes:

If you have multiple emails/websites, just list the emails/domains here and then create two password items: "Email" and "Website". For each email/website, include web address, login information and hosting access, if applicable.

Medical/Dental/Vision

●● Primary care physician: _____

●● Dentist: _____

●● Eye Dr: _____

●● Other Drs: _____

Prescriptions:

Other important medical details:

When adding medical practitioners to your contact list also indicate their specialty (i.e. Dr. Beth Harrison, Primary care)

Military

Dates of service: _____ Serial #/Grade: _____

Honors/Decorations: _____

Location of discharge papers: _____

In Case of Emergency - What My Family Should Know

Income accounts

If all your income accounts are handled by a financial advisor, do not create password items for each category listed below.

● All my investments are handled by: _____

- | | | | | | |
|----------------------|------------------------------|-----------------------------|----------------------|------------------------------|-----------------------------|
| ● Retirement/401(k): | Yes ☐ | No ☐ | ● Stocks/Bonds: | Yes ☐ | No ☐ |
| ● IRA Account(s): | Yes ☐ | No ☐ | ● Social Security: | Yes ☐ | No ☐ |
| ● Pension Plan: | Yes ☐ | No ☐ | ● Outstanding loans: | Yes ☐ | No ☐ |
| ● Cryptocurrencies: | Yes ☐ | No ☐ | | | |

If you have multiple accounts for any of the above categories, create one password item for each category and keep all the account info in one place (i.e. "Stocks/Bonds" would include ALL your stock and bond investment information.) Include account #, registered name on the account, and login information as well as the location of any loan document(s). For personal outstanding loans, also include the person you loaned the money to and the date/original amount of the loan.

Personal property

Primary residence: I own the property free & clear ☐ I have a mortgage with: _____

● Other real estate: _____

Hidden assets (cash, jewelry...): _____

Non-hidden assets (car, boat...): _____

Personal safe location: _____ Location of key: _____ or combination: _____

If you own "Other real estate", create a password item and include all relevant details. If it is owned outright, where the title is kept; and if there is a mortgage(s), the institutions that hold the deed(s). Include login information.

Liability accounts

- | | | | | | |
|------------------------|------------------------------|-----------------------------|--------------------|------------------------------|-----------------------------|
| ● Bank loan/mortgage - | Yes ☐ | No ☐ | ● Personal Loans - | Yes ☐ | No ☐ |
| ● Bank loan/HELOC - | Yes ☐ | No ☐ | ● Other loans - | Yes ☐ | No ☐ |
| ● Other Bank loans - | Yes ☐ | No ☐ | ● Credit Cards - | Yes ☐ | No ☐ |

Title each password item as labelled above. If you choose to have unique password items for each credit card, use additional descriptors to differentiate (i.e. "Credit Card - BankName - Personal" or "Credit Card - BankName - Business.") Each password item should include the name on account, account #, login credentials, and the location of any paper documents (if any.)

Bank accounts

- | | | | | |
|-----------------------|------------------------------|-----------------------------|-------------|------------------------------|
| ● Checking - | Yes ☐ | No ☐ | | |
| ● Savings - | Yes ☐ | No ☐ | | |
| ● Safety deposit box: | Yes ☐ | No ☐ | Bank: _____ | Key can be found here: _____ |

If you have multiple checking or savings accounts, you may create unique password items for each one (i.e. "Checking - BankName - Personal" or "Checking - BankName - Business". Include the registered name on each account, account #, and login credentials.