

IN CASE OF EMERGENCY

PEOPLE

EMPLOYER		
Phone	Email	Notes
FINANCIAL PLANNER		
Phase 3 Advisory		
Phone 847.520.5545	Email	Notes
ATTORNEY		
Phone	Email	Notes
ACCOUNTANT		
Phone	Email	Notes
INSURANCE AGENT		
Phone	Email	Notes
OTHER FINANCIAL PROFESSIONAL		
Phone	Email	Notes
RELIGIOUS ADVISOR		
Phone	Email	Notes
PASSWORD KEEPER		
Phone	Email	Notes

INSURANCE

AUTO		
Company	Account #	Notes
HEALTH		
Company	Account #	Notes
HOME		
Company	Account #	Notes
LONG TERM CARE		
Company	Account #	Notes
LIFE POLICY #1		
Company	Account #	Notes
LIFE POLICY #2		
Company	Account #	Notes

DOCUMENTS

POWER OF ATTORNEY	
Where	Key Person
HEALTH CARE PROXY	
Where	Key Person
WILL	
Where	Key Person
SAFE DEPOSIT BOX & KEY	
Where	Key Person
BIRTH/MARRIAGE CERTIFICATES	
Where	Key Person
SOCIAL SECURITY CARD	
Where	Key Person
PASSPORT	
Where	Key Person
DEEDS/TITLES CAR/HOUSE	
Where	Key Person
OTHER- Military Citizenship Adoption Pre-Nuptial Divorce Decree etc.	
Where	Key Person

FINANCIAL ACCOUNTS

CHECKING ACCOUNT		
Account Owner	Institution	Account Number
SAVINGS ACCOUNT		
Account Owner	Institution	Account Number
BROKERAGE ACCOUNT		
Account Owner	Institution	Account Number
IRA ACCOUNT		
Account Owner	Institution	Account Number
401(k)/403(b)		
Account Owner	Institution	Account Number
OTHER ACCOUNT		
Account Owner	Institution	Account Number
Account Owner	Institution	Account Number

RECURRING BILLS

MORTGAGE(S)		
Account #	Website	How Paid
Account #	Website	How Paid
CREDIT CARDS		
Account #	Website	How Paid
Account #	Website	How Paid
Account #	Website	How Paid
UTILITIES		
Account #	Website	How Paid
CABLE/INTERNET		
Account #	Website	How Paid
PHONES		
Account #	Website	How Paid
Account #	Website	How Paid
LOAN(S)		
Phone	Website	How Paid
MONTH PAYS		
Account #	Website	How Paid
Account #	Website	How Paid
Account #	Website	How Paid

IMPORTANT ITEMS

DUPLICATE KEYS	
Location	Notes
PRIMARY DOCTOR	
Name	Notes
LIST OF DOCTORS	
Location	Notes
LIST OF MEDICATIONS	
Location or list here	
LIST OF PEOPLE TO NOTIFY	
Location	Notes
ORGANIZATIONS TO NOTIFY	
Location	Notes
HOME INVENTORY LIST	
Location	Notes
BUSINESS PAPERS	
Location	Notes
RECENT TAX RETURNS	
Location	Notes
MISCELLANEOUS	
Location	Notes