

Be Prepared for the Unexpected

What your family should know



Will you and your loved ones be ready if a disaster strikes? Typically, there isn't much time to act, so it's important to be prepared now for a sudden emergency. By planning ahead, you can protect yourself and alleviate some of the confusion, fear and loss.

The following worksheets will help you get started. When you are caught in an emergency situation, you will not have much time to retrieve information. Organizing contact phone numbers, financial records, medical and property insurance policies and personal identification information will make it easier for you to access resources quickly. The time you spend on these worksheets now can potentially save you hours of headaches down the road.

Review this information regularly to make sure it's up-to-date. Place it somewhere that is secure, but easily accessible. We also recommend making photocopies of important documents and attaching them to the worksheets. Some important records would include financial statements, personal will, power of attorney, insurance policies and estate documents. Also, storing these documents electronically is recommended. Finally, you may want to consider giving a copy of these worksheets to someone you trust, such as your attorney or financial advisor.

Saving for Emergencies

Financial specialists agree that an emergency fund is an essential part of a person's financial preparedness strategy. This fund gives you quick access to money without any penalties or restrictions. Experts recommend setting aside a minimum of three to six months' worth of total living expenses. This emergency fund should be separate from your regular checking account as it is set up just for that purpose—emergencies.

Medical Information Before a medical emergency occurs, have all your vital medical information for yourself, family and pets in writing. Some examples of important medical information are physician's numbers, blood types, current medications and insurance identification numbers.

Emergency Contact Information

In addition to local emergency contacts, it is important to ask relatives or friends who live out of state to serve as a "clearinghouse" for information about you and your family, should a widespread emergency situation occur. In those situations, in-state phone lines can quickly become saturated and it might be easier to get a connection out of state.

Reunification Plan

You and your family members should decide on a secure location where family members can go, should you get separated during an emergency. During a widespread disaster, family members may not be able to get to that secure location immediately, but you will know they are attempting to get there as soon as possible.

Putting It All Together

Having your important personal information in the worksheets provided can help you assemble and organize pertinent documents that will be useful during an emergency. By planning ahead, you can help protect yourself and your loved ones during a crisis. Please adapt the following categories as they correspond to your individual situation.

Your Personal Information

Name:	Passport #:
DOB:	Soc. Sec. #/TIN:
Driver's License #:	Vehicle License Plate #:
Employer Name & Address:	
Supervisor's Name:	Phone #:
Supervisor's Email:	
Primary Care Physician Name:	Phone #:
Medical Plan Name:	Member ID:
Blood Type:	Allergies:
Medications:	

Spouse/Partner's Information

Name:	Passport #:
DOB:	Soc. Sec. #/TIN:
Driver's License #:	Vehicle License Plate #:
Employer Name & Address:	
Supervisor's Name:	Phone #:
Supervisor's Email:	
Primary Care Physician Name:	Phone #:
Medical Plan Name:	Member ID:
Blood Type:	Allergies:
Medications:	

Children's Information

Name:	Name:
Cell Phone #:	Cell Phone #:
SSN:	SSN:
Teacher:	Teacher:
Phone #:	Phone #:
Physician:	Physician:
Phone #:	Phone #:
Blood Type:	Blood Type:
Allergies:	Allergies:
Medications:	Medications:
Name:	Name:
Cell Phone #:	Cell Phone #:
SSN:	SSN:
Teacher:	Teacher:
Phone #:	Phone #:
Physician:	Physician:
Phone #:	Phone #:
Blood Type:	Blood Type:
Allergies:	Allergies:
Medications:	Medications:

Pet's Information

Pet Name:	Pet Name:
Veterinarian Name:	Veterinarian Name:
Phone: #:	Phone: #:
Medications:	Medications:

Banking Information

Institution Name:	Phone #:
Address:	
Checking Account #:	ATM:
Savings Account #:	Other Account #:
Institution Name:	Phone #:
Address:	
Checking Account #:	ATM:
Savings Account #:	Other Account #:

Credit Card Information

Credit Card Company:	
Account #:	Phone #:
Credit Card Company:	
Account #:	Phone #:
Credit Card Company:	
Account #:	Phone #:
Credit Card Company:	
Account #:	Phone #:

Mortgage Information

Institution Name:	
Account #:	Phone #:
Institution Name:	
Account #:	Phone #:

Loan Information

Home Equity Loan Provider:	
Account #:	Phone #:
Car Loan Provider:	
Account #:	Phone #:
Car Loan Provider:	
Account #:	Phone #:

Insurance Information

Automobile Insurance Provider:	
Policy #:	Phone #:
License Plate(s) for Vehicles Insured:	
Homeowner's Insurance Provider:	
Policy #:	Phone #:
Umbrella Insurance Provider:	
Policy #:	Phone #:
Life Insurance Provider:	
Policy #:	Phone #:
Disability Insurance Provider:	
Policy #:	Phone #:
Long-Term Care Insurance Provider:	
Policy #:	Phone #:

Investment Accounts

Firm Name:	Financial Advisor Name:
Phone #:	Email:
Address:	
Account Type:	Account #:
Account Type:	Account #:
Account Type:	Account #:
Account Type:	Account #:

Other Professional Services

Attorney:	Phone #:
Address:	
CPA/Tax Professional:	Phone #:
Address:	Account #:

Financial Information Locator

List the location of applicable items below.

Birth Certificates:

Adoption Papers:

Marriage Certificate:

Citizenship Papers:

Social Security Cards:

Military Service Records/Discharge Papers (DD214):

Employee Benefit Plan Information:

Life Insurance Policy:

Health Insurance Policy:

Auto Insurance Policy:

Homeowner's/Renter's Insurance Policy:

Disability Insurance Policy:

Other Insurance Policy:

Mortgage Papers:

Real Estate Deeds:

Title to Auto:

Title to Other Real Property:

Title to Cemetery Plots:

Business Agreements:

Safe Deposit Box Information:

Stock Certificates:

Bond Certificates:

Tax Records:

Investment Account Statements:

Checking Account Statements:

Savings Account Statements:

Wills and Trusts:

Living Will:

Loans/Credit Card Documents:

Other Important Documents:

Emergency Contact List *(make sure one contact is from out-of-state)*

Emergency: 911	Police Station:
Hospital:	Fire Station:
Name:	Address:
Home Phone #:	Cell Phone #:
Name:	Address:
Home Phone #:	Cell Phone #:
Name:	Address:
Home Phone #:	Cell Phone #:
Name:	Address:
Home Phone #:	Cell Phone #:

Emergency Meeting Places

Within the neighborhood:

Address:

Landmark:

Phone #:

Outside the neighborhood/Out of town:

Address:

Landmark:

Phone #: