

Estate Planning 101 Emergency Information Checklist

A checklist to establish an in case of emergency (ICE) preparedness binder for you and your family.

(Pages 237-243 of the book)



Important Contact Names and Phone Numbers

- Emergency numbers for utility companies
- Emergency numbers for utility companies
- Family and friends
- Kids' schools and daycare providers
- Doctors, dentists, and hospitals/clinics
- Clergy/religious leaders
- Work and business associates
- Non-emergency numbers for police, fire, ambulance, and city
- Funeral home
- Military services

Personal Details (for Each Family/Household Member)

- Full name, date of birth, and Social Security number
- Up-to-date photo
- Current employment/school details
- Copies of vital documents
 - Driver's licenses or state-issued ID cards
 - Social Security cards
 - Credit cards (front and back)
 - Military records
 - Adoption/foster records
 - Naturalization/immigration papers
 - Religious records
- Medical information
 - Advanced care directives
 - Medical power of attorney
 - Immunization records
 - Medical history if you have serious illnesses/diseases
 - Current prescription lists
 - Insurance information—copies of your cards (front and back)

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Personal Details (for Each Family/Household Member) continued

- Children
 - School details
 - Activities/routines
 - Close friends' names and parent contact info
 - Likes/dislikes
- Pets
 - Name, breed, date of birth
 - Veterinary info
 - Medical history and prescription details
 - Insurance info
 - Routine

Household

- Homeowner's insurance company/agent contact
- Home maintenance and repair information
- Contact details for service people
- Home inventory
- Utility company names and contact info
- Spare keys/security info
- Addresses and details of storage facilities
(Repeat for vacation homes/other real property)

Vehicles

- Auto insurance company/agent contact
- Copy of proof of insurance and registration
- Maintenance and repair information
- Contact details for sales and service providers
- Spare keys/security info
(Repeat for each vehicle)

A CRASH COURSE IN PLANNING FOR THE UNEXPECTED

ESTATE PLANNING 101

FROM AVOIDING PROBATE AND ASSESSING ASSETS TO ESTABLISHING DIRECTIVES AND UNDERSTANDING TAXES, YOUR ESSENTIAL PRIMER TO ESTATE PLANNING

CHOOSING THE RIGHT LIFE INSURANCE IS ONE OF THE MOST IMPORTANT ASPECTS OF ESTATE PLANNING.

ONE OF THE FIRST STEPS IN ESTATE PLANNING IS CHOOSING YOUR BENEFICIARIES, OR THE PEOPLE WHO WILL INHERIT YOUR ESTATE.

PROBATE, THE PROCESS WHERE A WILL MUST BE PROVEN IN COURT, CAN BE AVOIDED WITH THE CORRECT GUIDANCE.

VICKI COOK and AMY BLACKLOCK
Founders of Women Who Money

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Financial Information

- Banking
 - Branch location/contact/phone numbers
 - Savings and checking account numbers
 - Debit and credit card numbers
 - Auto deposit and bill pay info
 - Website, username, and passwords
 - Recent statement
- Credit cards
 - Issuers and contact details
 - Card account numbers
 - Website, username, and passwords
- Mortgage
 - Provider and contact details
 - Account number and payment details
 - Website, username, and passwords
- Other loans
 - Providers' contact info
 - Account numbers and payment details
 - Websites, usernames, and passwords
- Insurance
 - Company/agent details
 - Policy numbers, basics on coverage, deductibles
 - Website, username, and passwords
- Investment and retirement accounts
 - Financial institutions and phone numbers
 - Type of account (401(k), Roth or traditional IRA, brokerage)
 - Account numbers
 - Auto-investment option details
 - Website, username, and passwords
 - Recent statements

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Financial Other

- Copy of last two years' tax return (or location details of originals)
- Monthly/annual income and expense information
- Utility company payment details: account numbers, website, username, and passwords
- Cash for use in an emergency

Legal Documents If desired, keep originals secure and copies in your notebook.

- Power of attorney for you
- Power of attorney for others—if you're someone else's agent
- Will
- Deed and titles to your real estate, cars, and other motor vehicles
- Birth certificates—you can order duplicate official certificates from your state agencies
- Wedding licenses
- Passports
- Lease information
- Divorce decrees
- Death certificates

Digital Profiles and Passwords

- Email accounts
- Social media accounts
- Online forums
- Memberships (such as):
 - Amazon Prime
 - Apple
 - Hulu
 - Netflix
 - Cloud storage
 - Other



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Business

While you should have an emergency notebook specific for your business, providing some details in a home binder can be beneficial.

- Legal document (copies)
- Banking/financial information
- Important associates to contact
- Website management info
- Email account usernames and passwords
- Spare keys/security access info

Legacy/Other

- Letters of instruction
- Letters to family and friends
- Memorial service wishes
- Genealogy/ancestry/family tree info

**A CRASH COURSE
IN
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A LIVING WILL DICTATES WHAT ACTIONS SHOULD BE TAKEN FOR YOUR HEALTH IF YOU ARE NO LONGER ABLE TO MAKE DECISIONS FOR YOURSELF.

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