

Family Emergency Notebook

Use a 4-6 inch binder

Inside Cover: Important Business Cards

Examples: Banks, financial advisors, tax preparer, attorney, doctors, dentist, mechanic, insurance agent, school contacts

Section 1: Personal Information

Cover Sheet: List of all family members names, addresses, phones, email addresses, dates of birth, social security numbers

Contents: Copies of the following documents for each family member - Marriage license, birth certificates, social security cards, drivers' licenses, passports, licenses related to employment, baptism certificate, immunization records

Section 2: Financial Information

Cover Sheet: List all banks and credit card companies.

Contents: Banking: checking account #, savings account #, any other account #, bank contact info, online banking username and password

Credit / debit card(s): card #, exp. code, phone number, online banking username and password

Investments: (not retirement) account #, online banking username and password

Mortgage: lending institution name and contact, copy of mortgage and note, recent statement, website, username and password

Section 3: Insurance Information

Cover Sheet: List all insurance policies - life, disability, home, auto, umbrella

Contents: Copy of policy and annual statement, health and dental insurance cards, work life & disability policy information, insurance policy booklets if available

For each policy: Policy # and contact information, website, username and password

Section 4: Home and Auto Information

Cover Sheet: List of all real estate owned and all vehicles

Contents: Deeds, titles for all vehicles (license plate number, vehicle ID # (VIN), and title #), property tax assessments and contact information, vehicle registration cards, land surveys (if any), most recent appraisals, title insurance policies (if any)

Home Utility Bills Info: company name, website, user name and password for gas, electric, garbage, cable, internet, TV, cell phone, etc.

Home inventory or photos of each room showing contents

Section 5: Retirement

Cover Sheet: List all retirement plans by household member

Contents: For each pension, 401k, 403b, IRA: company name, website, user name and password, copy of annual statement

Social Security - copy of annual benefits notice

Section 6: Business Information

Cover Sheet: List of all business entities

Contents: For each business - organizational documents, ownership agreements, buy/sell agreements, EIN letter, tax return (most recent), annual Dept of State filing (if any), FinCEN registration proof

Section 7: Pet Information

Cover Sheet: List of all pets

Contents: ID Tag #'s, veterinary contact (name, phone, website), medications list, vaccination records, chip information, ages

Section 8: Medical Information

Cover Sheet: List of all physicians by family member

Contents: Medical history for each family member, medication list for each family member including drug name, dosage, purpose/use of medication, prescribing physician, copies of prescription or photo of pill bottle

Include over the counter medications

Section 9: Legal Information

Cover Sheet: Name, website and contact information for funeral home, cemetery, Attorney

Contents: Wills, trusts, powers of attorney (medical and financial), living wills (advanced directives), funeral/burial information for each family member

Section 10: Important Contacts

Contents: List of close family members names, addresses, telephone # and email address

List of close friends and neighbors' names, addresses, telephone # and email

Employers contact names, addresses, phones and email address

Business co-owners' names, addresses, telephone # and email addresses

Employee names, addresses, telephone # and email address