

From the authors of “Boomer Basics: Everything That You Need to Know about the Issues Facing You, Your Children, and Your Parents”

CRISIS INFORMATION CHECKLIST

In the event of a crisis, you should have the following information available to you:

DOCUMENTS:		Location of Documents
1. Healthcare Proxy/Living Will	<input type="checkbox"/>	
2. Power of Attorney	<input type="checkbox"/>	
3. Will	<input type="checkbox"/>	
4. Organ Donation Card/Instructions	<input type="checkbox"/>	
5. Cemetery Deed/Funeral Instructions	<input type="checkbox"/>	
6. Insurance Policies	<input type="checkbox"/>	
a. Health Insurance Policy	<input type="checkbox"/>	
b. Life Insurance Policy	<input type="checkbox"/>	
c. Disability Insurance Policy	<input type="checkbox"/>	
d. Long Term Care Insurance Policy	<input type="checkbox"/>	
e. Car Insurance Policy	<input type="checkbox"/>	
f. Homeowner’s Insurance Policy	<input type="checkbox"/>	
7. Existing Trust Documents, where you are the donor/beneficiary	<input type="checkbox"/>	
8. Business (partnership/shareholder) Agreements	<input type="checkbox"/>	
9. Deeds to Real Property	<input type="checkbox"/>	
10. Recent Tax Bill associated with Deeds	<input type="checkbox"/>	

11. Real Property Appraisals, if any	<input type="checkbox"/>	
12. Prior Gift Tax Returns	<input type="checkbox"/>	
13. Last Federal Income Tax Return	<input type="checkbox"/>	
14. Pre-Nuptial Agreements	<input type="checkbox"/>	
15. Waiver of Right of Election	<input type="checkbox"/>	
16. Other (guardianship papers, citizenship papers, military service records, visa/passport, birth certificate, divorce/separation agreement, adoption papers)	<input type="checkbox"/>	
ASSETS:		
17. Retirement Plan Benefits	<input type="checkbox"/>	
18. IRAs/Keoghs	<input type="checkbox"/>	
19. 401Ks	<input type="checkbox"/>	
20. Copy of Current Beneficiary Elections	<input type="checkbox"/>	
21. List of Bank Accounts	<input type="checkbox"/>	
22. List of Brokerage Accounts/Mutual Funds	<input type="checkbox"/>	
23. Safe Deposit Box Number and Location	<input type="checkbox"/>	

You should also have the names, addresses, and phone numbers of the following advisors:

	NAME	ADDRESS	PHONE #
Attorney	_____	_____	_____
Accountant	_____	_____	_____
Insurance Agent	_____	_____	_____
Financial Planner	_____	_____	_____