

# Family

CARE KIT

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PREPARED FOR:

*name* \_\_\_\_\_

*date* \_\_\_\_\_

Your personal documents and information regarding your accounts are very important in the event of an emergency. Share this organizer with a family member or caretaker. In the event of a catastrophe, serious illness, disability or death, this kit will provide an organized and understandable list of financial records and valuable information for both family and professional advisors.

*Update annually. Do not put this in a safe deposit box.*

*Reminder:* **DO NOT STORE THE ONLY COPIES OF THE FOLLOWING ITEMS IN A SAFE DEPOSIT BOX**



- FUNERAL/BURIAL INSTRUCTIONS
- HOMEOWNER/AUTO INSURANCE POLICIES
- LIFE INSURANCE POLICIES
- POWER OF ATTORNEY
- WILL/TRUST DOCUMENTS
- MEDICAL/DISABILITY POLICIES
- ADVANCE DIRECTIVE OR INSTRUCTIONS FOR MEDICAL CARE
- LARGE AMOUNTS OF CASH
- PROPERTY OWNED BY SOMEONE ELSE

## Professional Contacts



### INVESTMENT PROFESSIONAL

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### INSURANCE AGENT

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### BANKER

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### ATTORNEY

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### EXECUTOR

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### ESTATE TRUSTEE

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

### BUSINESS ADVISOR

*name* \_\_\_\_\_

*company* \_\_\_\_\_

*phone* \_\_\_\_\_

*address* \_\_\_\_\_

\_\_\_\_\_

# Important Documents

ARE STORED IN THESE LOCATIONS

<b>A</b>	<b>RESIDENCE</b> (Address/where documents are located)
<b>B</b>	<b>SAFE DEPOSIT BOX/KEY</b> (Bank address/key location)
<b>C</b>	<b>OFFICE</b> (Address/where documents are located)
<b>D</b>	<b>SAFE/LOCKBOX</b> (Address/combinations)
<b>E</b>	<b>OTHER</b> (Attorney/accountant/advisor)

PERSONAL	A	B	C	D	E
RELATIVES' NAMES/ADDRESSES					
MARRIAGE/DIVORCE CERTIFICATE					
BIRTH/ADOPTION CERTIFICATE					
MILITARY DOCUMENTS					
VISA/PASSPORT					
SOCIAL SECURITY CARD					

ESTATE PLANNING	A	B	C	D	E
WILL(S)/BENEFICIARIES					
TRUST AGREEMENT(S)/TRUSTEES					
POWER OF ATTORNEY					
LIVING WILL					
GUARDIANSHIP DOCUMENTS					
BURIAL INSTRUCTIONS/DOCUMENTS					

TAX RETURNS	A	B	C	D	E
FEDERAL INCOME TAX					
STATE & INTANGIBLE TAX					
LOCAL & PROPERTY TAX					
FICA/MEDICARE WITHHOLDING					

GROSS INCOME	A	B	C	D	E
WAGES/COMMISSIONS					
EMPLOYMENT CONTRACTS					
CHILD SUPPORT/ALIMONY					
PENSION/SOCIAL SECURITY					
RENTAL INCOME					
NOTES RECEIVABLE					

LIFE INSURANCE	A	B	C	D	E
EMPLOYER/BUSINESS INDIVIDUAL					
ANNUITIES/BENEFICIARIES					
OTHER DEATH BENEFITS					

DISABILITY INSURANCE	A	B	C	D	E
EMPLOYER/BUSINESS COVERAGE					
INDIVIDUAL SHORT/LONG-TERM					

HEALTH INSURANCE	A	B	C	D	E
EMPLOYER/BUSINESS GROUP					
INDIVIDUAL COVERAGE					

AUTO INSURANCE	A	B	C	D	E
COMMERCIAL COVERAGE					
INDIVIDUAL COVERAGE					

HOME/RENTERS'/BUSINESS INSURANCE	A	B	C	D	E
HOMEOWNERS/RENTERS'/CONDO					
FLOOD/EARTHQUAKE/WATERCRAFT					
COMMERCIAL PROP/CASUALTY					

LIABILITY INSURANCE	A	B	C	D	E
COMMERCIAL UMBRELLA					
INDIVIDUAL UMBRELLA					

ASSET INVENTORY	A	B	C	D	E
CASH/EMERGENCY FUNDS					
BANKS/CREDIT UNIONS					
MUTUAL FUNDS/BROKERAGE ACCTS					
BONDS (CORP, GOV'T, MUNICIPAL)					
ANNUITIES (FIXED/VARIABLE)					
COLLEGE FUNDS/PREPAID					
INDIVIDUAL RETIREMENT PLANS					
EMPLOYER RETIREMENT PLANS					
PARTNERSHIP/BUSINESS					
REAL ESTATE (DEED/MORTGAGE)					
PERSONAL PROPERTY					
TITLE, APPRAISAL, PHOTO, DEBT					

LIABILITIES	A	B	C	D	E
MORTGAGE(S)					
TAXES					
AUTOMOBILE LEASE/LOAN					
CREDIT CARDS					
CHILD SUPPORT/ALIMONY					
PARTNERSHIP/BUSINESS					
OTHER					

# Bank Accounts

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_

# Credit Cards

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_

bank \_\_\_\_\_

acct no. \_\_\_\_\_