

## Preparing for a Crisis — A Quick Reference Guide

Some conversations can be difficult to have, but it is important to speak to your loved ones about what to do should the worst happen. It's also important to keep detailed records that will make things easier for them in case of emergency. Making a list of documents and accounts (including where you keep them), as well as obligations, can ease the burden when you aren't there to help.



### DOCUMENTS – WHAT IS IT?

### WHERE IS IT?

Birth Certificate

Social Security Card

Driver's License Number

Passport

Insurance Policies

Powers of Attorney and  
Beneficiary Documents

Medical Records

Wills and Trusts

Deeds, Titles, and Mortgages

Military Service Records

Tax Records

### FINANCIALS – WHAT IS IT?

### WHERE IS IT?

### ACCOUNT # (if applicable)

Checking Account

Savings Account

Mutual Fund Accounts

Brokerage Accounts

Retirement Plan Accounts

Safe Deposit Box

## IN CASE OF EMERGENCY



MOORS & CABOT  
INVESTMENTS  
EST. 1890

| OBLIGATION – WHAT IS IT? | WHERE IS IT? | ACCOUNT # (if applicable) |
|--------------------------|--------------|---------------------------|
| Electricity Bill         |              |                           |
| Water Bill               |              |                           |
| Gas Bill                 |              |                           |
| Phone Bill               |              |                           |
| Cell Phone Bill          |              |                           |
| Cable and Internet       |              |                           |
| Subscriptions            |              |                           |
|                          |              |                           |
|                          |              |                           |
| Charitable Donations     |              |                           |
| Active Loans             |              |                           |

## Who to Call

In addition to keeping a list of documents, accounts, and obligations, it's important to have a list of contacts and phone numbers for those that your loved ones should get in touch with in case of an emergency.



| CONTACTS – WHO IS IT?  | NAME | PHONE # |
|------------------------|------|---------|
| Doctor                 |      |         |
| Attorney               |      |         |
| Accountant             |      |         |
| Insurance Agent        |      |         |
| Financial Professional |      |         |