

Checklist

In Case of Emergency, Break Glass!

- Letter of instruction
 - Child care form (1 for each child)
 - Senior care form (1 for each person)
 - Pet care form (1 for each pet)

- Will - 1 for each person

- Trust - Can be for couple combined

- Advisors - (spiritual, financial, legal, medical, accounting, other)

- Finances - (bank, credit cards, investments, 401(k), SEP, IRA)

- Retirement accounts - (pensions, annuities, VA benefits, military retirement (SBP option), and Social Security payments)

- Social Security death benefits

- Real estate - (location, mortgage, rental and landlord information)

- Military records (DD-214)

- Social Security card (copy of)

- Health care cards

- Insurance – policy numbers, beneficiaries, location
 - Life insurance
 - Long-term health care
 - Short-term disability

In Case of Emergency, Break Glass!

Long-term disability
House insurance
Car insurance
Boat insurance
Umbrella insurance

Car information

Title
Loan

Boat information

Plane information (hey, it could happen)

Utilities

Gas
Electric
Phone
Cell phone
Cable
Internet
Water
Trash

Powers of Attorney - Durable

General
Financial (for each financial institution)

Health care directives

End of life care
Do Not Resuscitate (DNR), if applicable

Memorial Instructions/Preferences

Church/Synagogue/Mosque/Temple
Service instructions (readings, songs, pallbearers, eulogy, spiritual leader)

Funeral Arrangements

- Prepaid plot
- Prepaid casket
- Cemetery
- Cremation versus burial
- Spiritual advisor
- Military honors

Reception

- Location (hotel, restaurant, home)
- Menu choice
- Bar options
- Entertainment

Important Papers

- Marriage License
- Divorce Papers
- Separation Agreements
- Death certificates
- Adoption papers

Employment information

- Supervisor (name and contact information)
- Human Resource Department (name and contact information)
- Business Partner

Volunteer position information

- Coordinator (name and contact information)

Employees (personal)

- Cleaning service
- In-home care service
- Personal assistant

Contacts

In Case of Emergency, Break Glass!

Family
Friends
Who to call first?
Personal representative

Passwords

Computer
Emails
Email accounts
Websites

Mary C. Kelly, PhD, is CEO of Productive Leaders. Mary created the In Case of Emergency, Break Glass! program as a simple way for her close friends to organize their important life documents in case of a natural disaster, evacuation, health care crisis, or death.

A Note from Mary:



Thank you for taking the time to organize the legal and necessary paperwork of your life. Getting all your documents in one central place is more important than you realize to the people left behind.

I recognize that this takes some time and effort, and I hope you feel satisfied once you are finished. The mere thought of all of the details can be overwhelming. I tried to break it up into manageable sections, to make the process easier. Good luck!

Mary@ProductiveLeaders.com

www.Organize-You.com