

# 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)

## In Case of Emergency, Break Glass!

- 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

## In Case of Emergency, Break Glass!

- Contacts**
  - 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](mailto:Mary@ProductiveLeaders.com)

[www.Organize-You.com](http://www.Organize-You.com)