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Comments

Emergency Checklist - What Do Your Loved Ones Need to Know if Something Happens to You?

This is an immediate action plan to help your loved ones immediately take action upon notification of your death or incapacity. It is not an all-inclusive list, but merely a guide to follow. Create your own emergency checklist with enough space to give them detailed instructions about what needs to be done immediately! Add any items that are specific to your own life and situation.

Called?

☐ Yes ☐ Left Message

Who is This Person?

☐ Who to Call or Notify? (e.g. family, friends, employer, employees, funeral director, lawyer, neighbors, etc.)

			Left Message	
		☐ Yes ☐ I	Left Message	
		☐ Yes ☐ I	Left Message	
		onics, firearms, computers, cash, etc.)		
Item to Secure	sets (e.g. valuables, jewelry, electro Description	onics, firearms, computers, cash, etc.) Where did you put it?	Done?	Comments
			Done?	Comments
Item to Secure				Comments
Item to Secure Firearms			□ Yes	Comments
Item to Secure Firearms Cash			☐ Yes ☐ Yes	Comments
Item to Secure Firearms Cash Jewelry			☐ Yes ☐ Yes ☐ Yes	Comments
Item to Secure Firearms Cash Jewelry Electronics			☐ Yes ☐ Yes ☐ Yes ☐ Yes ☐ Yes	Comments
Item to Secure Firearms Cash Jewelry Electronics Computers			☐ Yes	Comments
Item to Secure Firearms Cash Jewelry Electronics Computers Change Locks			☐ Yes	Comments

item	Telephone Number		Who	should they speak to?		Called Left	Message	Comments
Funeral Home				• •		☐ Yes ☐ Lef)	
Cremation						☐ Yes ☐ Lef	t Message	
Cemetery Plot/Vault						☐ Yes ☐ Lef	t Message	
Pre-Arranged Plan						☐ Yes ☐ Lef	t Message	
Officiant						☐ Yes ☐ Lef	t Message	
Eulogy						☐ Yes ☐ Lef	t Message	
Preferences						☐ Yes ☐ Lef	t Message	
Other						☐ Yes ☐ Lef	t Message	
	<u> </u>					ts & assets – wh		y stored/how are they accessed?) Comments
Name Will	Where are they lo	cateu:		What do they need to with Clerk of Court	uo:			Comments
						☐ Yes ☐ Lef	U	
Trust Prepaid funeral docs				ntact Attorney ntact funeral home		☐ Yes ☐ Lef	ŭ	
Insurance policies				omit claims		☐ Yes ☐ Lef	ŭ	
			Sub	omit ciaims		☐ Yes ☐ Lef		
Key to Safe Deposit Box (if any)						☐ Yes ☐ Lef	t Message	
Digital Data	Stored on computer					☐ Yes ☐ Lef	t Massaga	
Digital Data Digital Data	Stored in cloud					☐ Yes ☐ Lef	0	
Digital Data Digital Data	Stored in cloud Stored on device or e	lcowhore				☐ Yes ☐ Lef	ŭ	
Digital Data	Stored on device of e	18CW HCTC					i Message	
	<u>, </u>	oank acco	ount (e.g. paychecks, pension				
Payment from:	Bank & Account #	Amou	nt	Phone Number		on auto-pay?	Wha	at is this Payment for? Comments
		\$				Yes □ No		
		\$				Yes 🗆 No		
		\$				Yes □ No		
		\$				Yes □ No		
☐ Bills automatically	<u> </u>	account (Anytl					
Payment owed to:	Account #	Amou	nt	Phone Number		on auto-pay?	What is	this bill? Which Account? Comments
		\$				Yes 🗆 No		
		\$				Yes 🗆 No		
		\$				Yes 🗆 No		
		\$				Yes □ No		
		\$				Yes □ No		
		\$				Yes □ No		
1		\$				Yes □ No		

	D'II44'II	-114-	1.4		41
ш	Bills automatically	charged to	vour crean	caru or on	auto-renewai

Payment owed to:	Account #	Amount	Phone Number	Keep on auto-pay?	What is this bill? Which card? Comments
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	
		\$		☐ Yes ☐ No	

☐ Make list of Assets (e.g. Real Estate, Vehicles, Businesses, Bank, Investment, and Retirement Accounts, etc.)

Asset	Description & Location	Account Number	Value	Who is beneficiary or co-owner?
Real Estate			\$	
Vehicle(s)			\$	
Business Interest(s)			\$	
Bank Accounts			\$	
Investment Accounts			\$	
Retirement Accounts			\$	
Digital Assets			\$	
Safe			\$	
Safe Deposit Box			\$	
Artwork/Antiques			\$	
Collections			\$	
Patents/Royalties			\$	
Debts owed to you			\$	
Other Items of Value			\$	
Sentimental Value			\$	
Mileage Points			\$	
Hiding Places			\$	
Online Business			\$	
Online Accounts			\$	
Other:			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	

Asset	Name of (Creditor	Account	Number	Amount Owed	Phone Number & Details
Mortgage					\$	
Line of Credit					\$	
Student Loans					\$	
Credit Cards					\$	
					\$	
					\$	
					\$	
					\$	
					\$	
					\$	
ife Insurance	Company Ivame		1 oney #		one rumper	Comments
Asset	Company Name		Policy #	Ph	one Number	Comments
Disability Insurance						
Long-Term Care						
Health						
AD&D						
Other						
, -	book, LinkedIn, Twitter, In	stagram, persona	al websites, etc.)			
Account Info	Websi	te	UserName		Password	Comments
Email 1:						
Email 2:						
Email 3:						
acebook						
inkedIn						
witter						
nstagram						
Personal Website						
		i				
Business Website Other						

Name of person	Relationship of this person to you?	Instructions, if any	Called Left Message	Comments
			☐ Yes ☐ Left Message	
			☐ Yes ☐ Left Message	
			☐ Yes ☐ Left Message	
			☐ Yes ☐ Left Message	
anic of person	rame & Type of Let	mon uchono, n any		Comments
Who is to take care	of your pet(s)?			
Name of person	Name & Type of Pet	Instructions, if any	Called Left Message	Comments
			☐ Yes ☐ Left Message	
Name of person	Name & Type of Pet	Instructions, if any	☐ Yes ☐ Left Message ☐ Yes ☐ Left Message	
er Important In	formation:			
other Important In	formation:			
Other Important In	formation:			
Other Important In	formation:			
Other Important In	formation:			
Other Important In	formation:			

- 1. If you would like to provide your loved ones with a more comprehensive list of everything your loved ones need to know about you, consider buying a copy of my book entitled, "My "Everything" File®," which contains a 330-page workbook of important information covering 90 different topics, and which will guide you through the process of getting this information to your loved-ones. In addition to a more-detailed version of the above checklist, it also provides you with suggestions for creating a family legacy of family history, favorite family stories, life lessons learned, your medical history, and so much more information, you'll wonder that your head doesn't explode! If you think it is a lot of work to do it, imagine how much harder it will be for your loved ones to try to figure out what does not apply to you! They will thank you for your thoughtfulness in providing all this information to them.
- 2. Copies of My "Everything" File® are available for purchase for \$29.95 (plus shipping & taxes) at www.MyEverythingFile.com or on www.MyEverythingFile.com or www.MyEverythingFile.com or www.myEverythingFile.com or www.myEverythingFile.com o
- 3. Or, consider checking out the online workbook/course version of the book, which walks you through the entire process as well as enabling you to create a video legacy of you telling your favorite memories and family stories for future generations of your loved ones to enjoy. It is available for \$97.00 and can be accessed at www.MyEverythingFile.net/JerryS.

Thank you,

Jerrold E. Slutzky