

Emergency Planning Checklist

**If you were incapacitated today,
could your loved ones answer these questions?**

1. Who would make medical decisions?
2. Who would care for my dependents/pets?
3. Who could access my financial accounts and handle my bills?
4. Who could access my digital accounts?
5. Who knows where to find my legal documents?

What to put in your Emergency Plan:

IMPORTANT CONTACTS

- ☐ All emergency contacts
- ☐ Doctors
- ☐ Attorney
- ☐ Trusted family members or friends to notify in an emergency
- ☐ Guardian information & care instructions for dependents

LEGAL DOCUMENTS

- ☐ Will and/or Trust
- ☐ Powers of Attorney
- ☐ Living Will/Advance Directive
- ☐ HIPAA Authorization
- ☐ Funeral, burial, cremation, and organ donation preferences

FINANCIAL INFORMATION

- ☐ Bank accounts
- ☐ Investment and/or retirement accounts

- ☐ Debts and loan information
- ☐ Insurance policies (life, home, auto, health)
- ☐ Recurring bills, and how they are paid
- ☐ Sources of income

DIGITAL ACCESS

- ☐ Phone unlock method
- ☐ Password manager
- ☐ Two-factor authentication method

MEDICAL INFORMATION

- ☐ List of medications & allergies
- ☐ Insurance cards' location

PROPERTY & ASSETS

- ☐ House & vehicle keys & titles
- ☐ Utilities list
- ☐ Safe deposit box information & key location



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