

PREPARING FOR EMERGENCIES





Will you and your loved ones be ready the next time disaster strikes? By planning ahead, you can protect yourself and alleviate some of the confusion, fear, and loss.

The following worksheets will help you get started. When you're caught in an emergency situation, you won't have much time to retrieve information. Organizing contact phone numbers, financial records, medical and property insurance policies, and personal identification information will make it easier for you to access resources quickly. The time you spend on these worksheets now can potentially save you hours of headaches down the road.

Review this information regularly to make sure it's up to date. Place it somewhere that is secure, but easily accessible. We also recommend making photocopies of important documents and attaching them to the worksheet. Important records include financial statements, personal will, power of attorney, insurance policies, and estate documents. Also, storing these documents electronically using the cloud, is recommended. Finally, you may want to consider giving a copy of these worksheets to someone you trust, such as your attorney or financial advisor.

Preparing for Emergencies

Saving for Emergencies

Financial specialists agree that an emergency fund is an essential part of a financial preparedness strategy. This fund gives you quick access to money without any penalties or restrictions. Experts recommend setting aside a minimum of three to six months' worth of total living expenses. This emergency fund should be separate from your regular checking account and is set up just for that purpose—emergencies.

In the event of a natural disaster, it's also recommended to have cash available at hand to support your family for three to five days, since ATMs and banks may not be easily accessible.

Medical Information

Before a medical emergency occurs, have all your vital medical information for yourself, family, and pets in writing. Some examples of important medical information are physicians' numbers, blood types, current medications, and insurance identification numbers.

Emergency Contact Information

In addition to local emergency contacts, it's important to ask relatives or friends who live out of state to serve as a "clearinghouse" for information about you and your family, should a widespread emergency situation occur.

Reunification Plan

You and your family members should decide on a secure location where family members can go should you get separated during an emergency. During a widespread disaster, family members may not be able to get to that secure location immediately, but you will know they are attempting to get there as soon as possible.

Putting It All Together

Having your important personal information in the worksheets provided can help you assemble and organize pertinent documents that will be useful during an emergency. By planning ahead, you can help protect yourself and your loved ones during a crisis. Please modify the following categories as they correspond to your individual situation.

Date Last Updated: _____

Your Personal Information

Name: _____ SSN: _____

Phone #: (_____) _____ Cell Phone #: (_____) _____

Birth Date: _____ Passport #: _____

Driver's License #: _____ Vehicle License Plate #: _____

Employer Name & Address: _____

Supervisor's Name: _____ Phone #: (_____) _____

Supervisor's Email Address: _____

Primary Care Physician Name: _____ Phone #: (_____) _____

Medical Plan Name: _____ Member ID: _____

Blood Type: _____ Allergies: _____

Medications: _____

Spouse / Partner's Information

Name: _____ SSN: _____

Phone #: (_____) _____ Cell Phone #: (_____) _____

Birth Date: _____ Passport #: _____

Driver's License #: _____ Vehicle License Plate #: _____

Employer Name & Address: _____

Supervisor's Name: _____ Phone #: (_____) _____

Supervisor's Email Address: _____

Primary Care Physician Name: _____ Phone #: (_____) _____

Medical Plan Name: _____ Member ID: _____

Blood Type: _____ Allergies: _____

Medications: _____

Children's Information

Child Name (1): _____

Child Name (2): _____

Cell Phone #: (_____) _____

Cell Phone #: (_____) _____

SSN: _____

SSN: _____

Daycare/School Name: _____

Daycare/School Name: _____

Phone #: (_____) _____

Phone #: (_____) _____

Teacher: _____

Teacher: _____

Phone #: (_____) _____

Phone #: (_____) _____

Physician: _____

Physician: _____

Phone #: (_____) _____

Phone #: (_____) _____

Blood Type: _____

Blood Type: _____

Allergies: _____

Allergies: _____

Medications: _____

Medications: _____

Child Name (3): _____

Child Name (4): _____

Cell Phone #: (_____) _____

Cell Phone #: (_____) _____

SSN: _____

SSN: _____

Daycare/School Name: _____

Daycare/School Name: _____

Phone #: (_____) _____

Phone #: (_____) _____

Teacher: _____

Teacher: _____

Phone #: (_____) _____

Phone #: (_____) _____

Physician: _____

Physician: _____

Phone #: (_____) _____

Phone #: (_____) _____

Blood Type: _____

Blood Type: _____

Allergies: _____

Allergies: _____

Medications: _____

Medications: _____

Pets' Information

Pet Name (1): _____

Pet Name (2): _____

Pet Type: _____

Pet Type: _____

Veterinarian Name: _____

Veterinarian Name: _____

Phone #: (_____) _____

Phone #: (_____) _____

Medications: _____

Medications: _____

Special Needs: _____

Special Needs: _____

Investment Accounts

Firm Name: _____ Financial Advisor Name: _____

Phone #: (_____) _____ Email: _____

Address: _____

Account Type: _____ Account #: _____

Account Type: _____ Account #: _____

Account Type: _____ Account #: _____

Account Type: _____ Account #: _____

Other Professional Services

Attorney: _____ Phone #: (_____) _____

Address: _____

CPA/Tax Professional: _____ Phone #: (_____) _____

Address: _____ Account #: _____

Banking Information

Bank Name: _____ Phone #: (_____) _____

Address: _____

Checking Acct. #: _____ ATM: _____

Savings Acct. #: _____ Other Acct. #: _____

Bank Name: _____ Phone #: (_____) _____

Address: _____

Checking Acct. #: _____ ATM: _____

Savings Acct. #: _____ Other Acct. #: _____

Insurance Information

Automobile Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Cars Insured (license plates): _____

Insurance Information (continued)

Homeowner's Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Umbrella Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Life Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Disability Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Long-Term Care Insurance Provider: _____

Policy #: _____ Phone #: (_____) _____

Credit Card Information

Credit Card Company: _____

Account #: _____ Phone #: (_____) _____

Credit Card Company: _____

Account #: _____ Phone #: (_____) _____

Credit Card Company: _____

Account #: _____ Phone #: (_____) _____

Credit Card Company: _____

Account #: _____ Phone #: (_____) _____

Mortgage Information

Institution Name: _____ Phone #: (_____) _____

Account #: _____

Institution Name: _____ Phone #: (_____) _____

Account #: _____

Consumer Loans

Home Equity Loan Provider: _____ Phone #: (_____) _____

Account #: _____

Car Loan Provider: _____ Phone #: (_____) _____

Account #: _____

Emergency Contact List (make sure one contact is from out-of-state)

Emergency: 911 _____ Police Department: _____

Hospital: _____ Fire Station: _____

Name: _____ Relationship: _____

Address: _____

Home Phone #: (_____) _____ Cell Phone #: (_____) _____

Name: _____ Relationship: _____

Address: _____

Home Phone #: (_____) _____ Cell Phone #: (_____) _____

Emergency Meeting Places

Within the Neighborhood

Address: _____

Landmark: _____ Phone #: (_____) _____

Outside the Neighborhood/Out of Town

Address: _____

Landmark: _____ Phone #: (_____) _____

Miscellaneous Information

Securities offered through LPL Financial, Member FINRA/SIPC.

To the extent you are receiving investment advice from a separately represented independent investment advisor, please note that LPL Financial is not an affiliate of and makes no representation with respect to such entity.

Not FDIC/NCUA Insured	Not Bank/Credit Union Guaranteed	May Lose Value
Not Insured by any Federal Government Agency		Not a Bank/Credit Union Deposit