

Financial Preparedness Checklist

An important part of emergency preparation is financial planning for unexpected events.

Get ready...

- Assess potential risks to your family and getting adequate insurance to protect your family's health, life and property. Create a financial safety net in the event of job loss or disability. Seek the advice of legal and financial professionals to ensure you meet the needs of your current situation.
- Protect important financial and legal records
- Preparing loved ones to cope with recovery in the event you are not there to care for them.

Use this checklist as you make your arrangements. Copies of these important documents will be valuable for evacuations and rebuilding efforts. Create a **financial disaster recovery kit** by gathering the following items together and storing them in a safe location, whether it be a home safe or a portable, waterproof bag:

Emergency Preparedness Records*

	Not Applicable/ In Progress	Done
Birth, death and marriage certificates		
Divorce and child custody papers		
Adoption papers		
Passports		
Naturalization / Citizenship Papers		
Military records		
Social security cards		
Copies of driver's license		
Mortgage/property deeds		
Stock and bond certificates		
Car titles		

Life & health insurance policies (life, medical, dental disability, long term care) Type, company, policy number and name of insurer		
Homeowners, renters insurance		
Auto, motorcycle, boat, or other vehicle insurance		
Auto, motorcycle, boat, or other vehicle title papers		
Copies of power of attorney, advance medical directive, medical power of attorney, guardianship papers		
Trust documents		
Household Inventory		
State & Federal tax returns (3 years)		
Medical Information: Immunization/medical condition records Prescriptions		
Letter of instructions to survivors		
Cash – ATM or bank services may be disrupted		
Bank Statements		
Credit Card numbers		
A list of phone numbers for financial institutions and credit card companies where you have accounts		
Residential Items: an inventory of household possessions, appraisals of valuable items (jewelry, art, antiques, heirlooms), home improvement records		
Critical Computer Files: multiple backup copies of important documents from your personal and work computers		
Contact Information: a list of names, phone numbers, and e-mail addresses of family members, friends, business contacts, and emergency assistance agencies in your area, such as the Red Cross		

Note: Home safes are convenient but they can be damaged by tsunami, flood or hurricanes. Safety deposit box at your financial institution may be more secure but not easily accessible in an emergency.