

Handout E: Disaster Preparedness File

The following information may be organized in a pre-purchased kit, a school binder, or in scanned documents stored on a computer disk:

Identity Documents

- Birth, death, marriage certificates (make a note to the holder of this file that they should immediately make at least 10 copies of each in case they are executor or are asked to help an executor)
- Social Security Cards
- Citizenship papers
- Divorce/Separation papers
- Adoption papers, if applicable
- Military discharge papers, if applicable
- Passports
- Key identification numbers, including drivers' license, passport and employee identification data

Financial Documents

- Checking/Savings records
- Investment accounts
- Titles and deeds to real estate
- Time share agreements
- Stock/Bond certificates
- Employee benefit documents
- Car title, lease, loan information and license plate data
- Boat ownership records
- Loan agreements
- Credit card information, including photocopies of credit and debit cards, front and back (displaying the individual's signature)
- Student loan information
- Personal/Business lines of credit
- *Insurance Documents*
- Life insurance policies
- Health insurance policies
- Disability insurance policies
- Long-term care policies
- Homeowner's insurance policies
- Renter's insurance policies
- Auto insurance policies
- Dental insurance policies
- Umbrella insurance policies



Estate Planning Documents

- Wills
- Trust documents
- Durable power of attorney for health care
- Durable power of attorney for finance

Miscellaneous

- Employment contracts
- Business agreements
- Tax returns, for the past three years
- Safe combination
- All user IDs and passwords for online accounts, including access to computer
- Location of safe-deposit, lockbox and filing cabinet keys
- Detailed funeral and burial wishes
- Location of cash that may be used to handle emergency expenses
- Recent medical records that may be good to have on hand if the individual is incapacitated
- All relevant contact numbers for executors, financial advisers, trustees, guardians, attorneys and any other pertinent individuals
- Guidelines on what to do about orphaned pets, including set plans for who will adopt them and pay for their care