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Emergency File for Your Family

It isn't easy to plan for the possibility of debilitating illness or death. But by thinking about your desires, making good plans, sharing them with your loved ones, and reviewing and updating them each year, you can take comfort in the fact that your family will be provided for as well as possible.

Make sure your spouse and family know how to contact your professional advisors if something happens to you. And consider giving your financial advisor and family copies of any documents they would need in the event of your death. Doing this could also help in the event of a flood or fire. Here's a list to get you started:

CONTACT INFORMATION

- Financial advisor
- Attorney
- Accountant
- Physician
- Other close advisors

DOCUMENTATION

- Last will and testament
- Deeds for your home and any investment properties
- Titles to cars or other property
- Tax returns
- Birth certificates
- Marriage license
- Military discharge papers
- Insurance policies
- Banking contact names and statements
- Investment statements
- Internet account usernames and passwords
- If self-employed, documents surrounding your business or partnership