**Insurance and Legal Information Emergency Plan**

This emergency plan is to ensure you are prepared in the event of an unexpected emergency.

**Insurance Information**

**Homeowners/Renters Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Flood Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Valuables Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Auto Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Health Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Vision Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Dental Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Life Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Disability Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Liability Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Pet Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Long Term Care Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Other Insurance**

|  |  |
| --- | --- |
| Insurance Company |  |
| Policy Number |  |
| Agent Name |  |
| Phone |  |

**Legal Information**

**Lawyers**

|  |  |
| --- | --- |
| Name |  |
| Firm |  |
| Phone |  |
| Email |  |

**Lawyers**

|  |  |
| --- | --- |
| Name |  |
| Firm |  |
| Phone |  |
| Email |  |

**Lawyers**

|  |  |
| --- | --- |
| Name |  |
| Firm |  |
| Phone |  |
| Email |  |

**Location of Wills**

|  |  |
| --- | --- |
| Location |  |
| Date Signed |  |
| Contact Name |  |
| Phone |  |
| Executor of Will |  |
| Executor Phone |  |

**Location of Wills**

|  |  |
| --- | --- |
| Location |  |
| Date Signed |  |
| Contact Name |  |
| Phone |  |
| Executor of Will |  |
| Executor Phone |  |

**Location of Trusts**

|  |  |
| --- | --- |
| Location |  |
| Contact Name |  |
| Phone |  |

**Location of Power of Attorney Documents**

|  |  |
| --- | --- |
| Location of Original |  |
| Location of Copy |  |

**Location of Pre-Nuptial Agreement**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Marriage License**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Birth Certificates**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Adoption Papers**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Custody Agreements**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Educational Credentials**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Military Papers**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Death Certificates**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Citizenship Documents**

|  |  |
| --- | --- |
| Location |  |
|  |

**Location of Other Legal Documents**

|  |  |
| --- | --- |
| Location |  |
|  |

|  |  |
| --- | --- |
| Location |  |
|  |

**Passport Information**

|  |  |
| --- | --- |
| Name |  |
| Location of Passport |  |
| Expiration Date |  |

|  |  |
| --- | --- |
| Name |  |
| Location of Passport |  |
| Expiration Date |  |

|  |  |
| --- | --- |
| Name |  |
| Location of Passport |  |
| Expiration Date |  |

|  |  |
| --- | --- |
| Name |  |
| Location of Passport |  |
| Expiration Date |  |

**Real Estate Deeds/Purchase Agreements**

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

|  |  |
| --- | --- |
| Description |  |
| Location of Documents |  |

**Automobile Information**

|  |  |
| --- | --- |
| Pink Slip | |
| Car Make/Model & Year |  |
| Location of Documents |  |
|  |

|  |  |
| --- | --- |
| Pink Slip | |
| Car Make/Model & Year |  |
| Location of Documents |  |
|  |

|  |  |
| --- | --- |
| Lease Information | |
| Expiration Date |  |
| Lease Location |  |
| Contact Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Lease Information | |
| Expiration Date |  |
| Lease Location |  |
| Contact Name |  |
| Phone |  |

**Financial Planning**

**Bank Information**

|  |  |
| --- | --- |
| Name |  |
| Branch Location |  |
| Contact |  |
| Phone/Email |  |

|  |  |
| --- | --- |
| Name |  |
| Branch Location |  |
| Contact |  |
| Phone/Email |  |

**Partnership Information**

|  |  |
| --- | --- |
| Partnership |  |
| Name |  |
| Address |  |
| City, State, Zip |  |

|  |  |
| --- | --- |
| Partnership |  |
| Name |  |
| Address |  |
| City, State, Zip |  |

**Financial Advisor**

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |

**CPA**

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |

**Loans**

|  |  |
| --- | --- |
| Name |  |
| Lender’s Name |  |
| Phone/Email |  |

|  |  |
| --- | --- |
| Name |  |
| Lender’s Name |  |
| Phone/Email |  |

|  |  |
| --- | --- |
| Name |  |
| Lender’s Name |  |
| Phone/Email |  |

**Stock Broker/Investment Account**

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |

**Mutual Funds**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Safety Deposit Box**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Mortgage**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**401K**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Pension**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Retirement Accounts**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Real Estate**

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

**Credit/Debit Cards** (Do not put account numbers, only list card name/issuing bank and phone number.)

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |

|  |  |
| --- | --- |
| Name |  |
| Phone/Email |  |