

Emergency Planning 101



Are you one of the 1 in 8 Americans between ages 40 and 60 who is both raising children and caring for aging parents?

Helping aging parents prepare for emergencies and disaster is probably just as difficult as helping your teen learn to drive. Neither is easy- both are over-confident and want to take short cuts.

Just as you have to learn about how to handle different road conditions, different driving situations – so we must help Grandma prepare for different types of emergencies and disaster. This is a monumental task if Grandma lives many miles away.

It is difficult to get excited about disaster and emergency planning...especially when there are so many different kinds of unpredictable situations. Last week, we talked about what you would do if you heard there was a raging wildfire headed your way and you had to leave your home in 4 hours.

What do you take with you in case of emergency? Is there a game plan in place for your family home and what about your aging loved one's home?

What kind of “stuff” will you need before an emergency and what will you need after to reconstruct your life and your home?

Is there a common denominator with wildfires, hurricanes, flooding, tornadoes, snow storms and ice storms? **Yes, the common denominator is your important paper documentation.** There will be a check-list for you to share with your loved one as well as for your own family home. Having your important papers together is just as important as having enough auto insurance to cover your teen driver.

So get started today > Print off the attached paper inventory forms (pdf) and get one to every aging loved one you knowit may save them timeless amounts of grief and suffering after an emergency – many times assistance is denied if you don't have the necessary paper work.....

If you don't have a metal or fireproof file folder box....get one ASAP! Starting at around \$10 at most from retailers or discount places like Walmart or Big Lots. This is serious!

A check list to help and guide you in assembling important documents that you could need in case of an emergency or disaster.

Steps to help you:

1. Collect at least 7-10 file folders or large manila envelopes (10x12)
2. Clearly label each folder or envelope before you start
3. Do one folder at a time and place in a metal-carry-file case
4. When all folders are complete, place the indexed file in a safe, convenient spot for you to grab in case of an emergency.

God Speed!



| Item | | | Completed (Date) | Not Completed |
|---|--------------------|---------------------------|-----------------------|------------------|
| List of all Social Security numbers and documents | | | | |
| Birth Certificate(s) | | | | |
| All Medicare-Medicaid information (include plans, supplements, and security/access codes/pin numbers) | | | | |
| All medical directives | | | | |
| All power of attorney documents and information | | | | |
| All military discharge papers | | | | |
| Medical – List of all M.Ds and Specialists (fill in below) | | | | |
| <i>Name</i> | <i>Telephone #</i> | <i>Last Visit (Appt.)</i> | | |
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| Prescription list of all prescriptions you take: | | | | |
| <i>Pharmacy</i> | <i>Address</i> | <i>Telephone #</i> | <i>Prescrip. Name</i> | |
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List of Dentists

| <i>Name</i> | <i>Address</i> | <i>Telephone #</i> | <i>Last Visit</i> | | |
|-------------|----------------|--------------------|-------------------|--|--|
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Eye Care – Do you have a backup/current prescription for your glasses?

| <i>Name</i> | <i>Address</i> | <i>Telephone #</i> | <i>Last Visit</i> | | |
|-------------|----------------|--------------------|-------------------|--|--|
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Comments:



| Item | | | | Completed (Date) | Not Completed |
|---|---------------------------------------|---|--|---------------------|------------------|
| Life Insurance (Keep in file) | | | | | |
| <i>Policy #</i> | <i>Company</i> | <i>Agent Name</i> | <i>Telephone #</i> | | |
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| Trust Papers (Can keep in folder?) | | | | | |
| <i>Prepared By: (Name)</i> | <i>Address</i> | <i>Telephone #</i> | <i>Date Prepared</i> | | |
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| Wills (include a copy of the will in the folder) | | | | | |
| <i>Prepared By: (Name)</i> | <i>Address</i> | <i>Telephone #</i> | <i>Date Prepared</i> | | |
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| Lock Boxes | | | | | |
| <i>Location</i> | <i>Who is authorized to sign?</i> | <i>Spare Key? (attach to this page)</i> | <i>Passwords required? If yes, what?</i> | | |

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Final Wishes

Include any written wishes in this file.

Funeral Arrangements

List any prepaid plans

Comments:



| Item | | Completed (Date) | Not Completed |
|---|----------------------|---------------------|------------------|
| List of all Banking Accounts with account numbers | | | |
| <i>Checking</i> | <i>Account #</i> | | |
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| <i>Savings</i> | <i>Account #</i> | | |
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| | | | |
| Money Markets | | | |
| <i>Certificate of Deposits</i> | <i>Maturity Date</i> | | |
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| Photo Copy Debit Card (front and back), along with pin number | | | |
| Photo Copy of all charge cards (front and back) | | | |
| List all brokerage accounts and portfolio confirmation | | | |
| Include any maturity dates | | | |

| <i>List brokers</i> | <i>Address</i> | <i>Telephone #</i> | <i>Account #</i> | | |
|--------------------------------------|----------------|--------------------|------------------|--|--|
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| List any special investment accounts | | | | | |

Comments:



| Item | Completed (Date) | Not Completed |
|-------------------------------|---------------------|------------------|
| List of any art work | | |
| List of any jewelry | | |
| List of any antiques | | |
| List of any coins/collections | | |

Comments:



| Item | | | | Completed (Date) | Not Completed |
|---------------------------------|----------------|--------------------|------------------------------|---------------------|------------------|
| List Vet information | | | | | |
| <i>Vet Name</i> | <i>Address</i> | <i>Telephone #</i> | <i>Last Visit (date)</i> | | |
| | | | | | |
| | | | | | |
| List of any registration papers | | | | | |
| List of any medication | | | | | |
| Special Instructions | | | | | |

Comments:



| Item | Completed (Date) | Not Completed |
|--|---------------------|------------------|
| Any documents that are of value to you (ex. Military History, photos, etc.) | | |
| Marriage Certificate | | |
| Family Tree | | |

Comments: