

## CRITICAL INFORMATION SAMPLE LIST

<b>Contact List - In Case of Emergency</b>					
Name	Telephone Numbers	Mailing Address	E-Mail Address	Relationship	Misc.
<b>Bank Account Information</b>					
Name of Bank & Contact Info.	Account Numbers / Type of Account	Name on Account (Title)	Safe Deposit Box, Location of Key & List of Contents	PIN & Internet Log-in + Passwords	Misc.
<b>Credit Cards</b>					
Credit Card Company & Contact Info.	Account Number	Exp. Dates & "Verification Number" <small>(Typically 3-4 Numbers Located on Back of Card)</small>	Special Programs & Passwords / PINs	Automatic Charges <small>(Subscriptions, Cell Phone etc.)</small> & Contact Info.	Misc. / Balances Owed

## Investment & Retirement Accounts

Brokerage Account and/or Employer-Sponsored Retirement Plan Contact Info.	Account Numbers	Contact Info. for Banks and/or Brokers	Current Beneficiary(ies) Listed on Account	Account PIN or Other Log-in & Password	

## Taxes

Accountant's Name	Contact Info.	Years Taxes were Filed	Location of Previous Tax Return Documents & Log-in + Password	Dates Real Estate Taxes Due	Location of Real Estate Tax Bill for Each Property

## Real Estate

Property Addresses	Mortgage / Rent Payment Due Dates & Amounts	Contact Info. for Lender(s) Company(ies)	Location of Current Deeds, Mortgages, & Title Insurance Policies	Contact Info. For Service & Maintenance Providers	Contact Info. for Home Security System & Any Keypad Passcode

### Insurance

Name of Insurance Company & Contact Info.	Policy Numbers	Location of Original Policies	Premium Due Dates & Amounts	Coverage Amount	Military Discharge Papers (Military Insurance)

### Healthcare

Name & Contact Info. for Providers (Doctors, Dentists, etc.)	Medicare Claim Number	Medicines & Dosage Info.	Prescription Numbers	Primary Pharmacy Contact Info.	Medigap Policy Number

### Legal Documents

Location of Original Signed Documents	Location of Copies of Signed Documents	Named Fiduciary(ies) Contact Info.	Acting as Executor, Power of Attorney, Trustee etc.	Contact Info. for Lawyers, Accountants, Financial Planners etc.

### Persons For Whom I Am Responsible

Name of Person For Whom I Am Legally Responsible	Reason I Am Responsible	Contact Info for Person I am Responsible For	Any Important Info. Regarding Person

### Domestic Animals

Name & Breed of Domestic Animal(s)	Relevant Info. and/or Special Instructions Regarding Any Domestic Animal(s)

### Wishes

Funeral & Burial Arrangements	Contact Info. for Funeral Home & Burial Location	Organ Donation Wishes	Misc. Wishes

### Miscellaneous

Driver's License Number & Exp. Date	Vehicle Registration Info.	Location of All Vehicle Titles <small>(i.e. Boat, RV)</small>	Info. of Storage Facility & Items Stored + Passcodes or Location of Keys	List of Neighbors/ Friends & Contact Info.	List of Neighbors Allowed Access to Home(s)

Cellphone Passcode	Cellphone Voicemail Passcode	P.O. Box(es) Info. & Location of Keys	All E-mail Accounts & Passwords <small>(Including Online Retail Accounts)</small>	Any Other Important Info.