

Where to find What in an Emergency

Date _____

Safe-deposit Box and Key _____

Bank Records/CDs/Passbooks _____

Stock, Bond Certificates _____

Other Investments/Records _____

Tax Records/Copies of Latest Income Tax Returns _____

Business Records _____

Deed and Mortgage Info _____

Will and Trust(s) _____

Life Insurance Policies _____

Pension, Profit Sharing and IRAs _____

Passport/Birth Certificate _____

My Accountant Is _____

My Lawyer is _____

My Broker is _____

My Financial Planner is _____

My Trust Officer is _____

My Company Personnel Office Phone is _____

My Executor is _____