

# 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 \_\_\_\_\_