

## “JUST THE BASICS”

### Crisis Management Checklist

#### Legal

##### Documents Everyone Should Have

- \_\_\_\_\_ Will
- \_\_\_\_\_ Durable (Financial) Power of Attorney
- \_\_\_\_\_ Medical Power of Attorney
- \_\_\_\_\_ Directive to Physicians (Living Will)

##### Documents to Address Specific Needs

- \_\_\_\_\_ Declaration of Guardian in Advance of Need (Adult guardianship)
- \_\_\_\_\_ Appointment of Guardian (Child’s guardianship)
- \_\_\_\_\_ Do Not Resuscitate Order
- \_\_\_\_\_ Organ Donation
- \_\_\_\_\_ Disposition of Remains
- \_\_\_\_\_ Trusts; living trust, special needs trust, charitable trust, pet trust, contingent trust, life insurance trust

#### Non-Legal

- \_\_\_\_\_ Spiritual or Ethical Will
- \_\_\_\_\_ Letters to future caretakers of your children
- \_\_\_\_\_ Letters of explanation to executors and/or beneficiaries
- \_\_\_\_\_ Prepaid funeral plan
- \_\_\_\_\_ Beneficiary or payable on death (POD) statements for life insurance, investments, retirement accounts, bank accounts



## Financial

- \_\_\_\_\_ Do you know where your financial accounts are currently held?
- \_\_\_\_\_ What is your current retirement plan?
- \_\_\_\_\_ Is your retirement plan adequately funded?

## Information

This is the information that should be immediately available to your spouse, executor or agents. Consider compiling this information in a binder.

- \_\_\_\_\_ Location of wills, powers of attorney and other legal documents, along with contact information for your estate planning attorney
- \_\_\_\_\_ Detailed list of financial accounts including institution, account number and contact person
- \_\_\_\_\_ Contact information for your financial planner
- \_\_\_\_\_ Contact information for your tax professional/CPA
- \_\_\_\_\_ List of life insurance policies, location of policy and contact information, if relevant
- \_\_\_\_\_ List of care instructions for pets, along with contact information for your veterinarian
- \_\_\_\_\_ Location of birth certificates, immunization records and other important documents for your minor children
- \_\_\_\_\_ Location of birth certificates, marriage license, divorce records, military records and other important documents for adults
- \_\_\_\_\_ Contact information for doctors (personal and children)
- \_\_\_\_\_ Information on prepaid funeral arrangements, plots or other memorial plans
- \_\_\_\_\_ Information on employee benefits, along with contact information for employer/human resources
- \_\_\_\_\_ Information on business ownership, location of managing documents for business and contact information for other owners, managers, or key employees
- \_\_\_\_\_ Contact information for your Pastor/Church
- \_\_\_\_\_ Where to find electronic user names and passwords for online financial, social and hobby/leisure accounts, etc. (including, but not limited to, credit cards, mortgage, household utilities/services, vehicles, cell phones, magazines, computer off-site/back-up storage, cloud storage, high school/college organizations, volunteer/fraternal organizations, Facebook, LinkedIn, Twitter, Instagram, Ancestry, Pinterest, etc.)