

FINANCIAL EMERGENCY CHECKLIST

A Safe Deposit Box Should Include:

- Deeds to your home and titles to vehicles
- Birth certificates, passports
- Originals or copies of your insurance policies
- Investment certificates, marriage certificates, powers of attorney, advanced healthcare directives
- Copies of wills (keep originals with an attorney)
- Key identifiers such as driver's license numbers, passwords and/or combinations

Cash Inventory

- Keep a small amount of cash or traveler's checks at home; local ATMs, credit unions and banks may shut down
- Save emergency funds

Evacuation Box

- The box should be durable, lockable and contain self-sealing plastic bags to protect documents
- Keep the box in the house, near an emergency exit.
- Do not store it in an unattended car.
- Include in the box (minimally):
- Safe deposit box key
- Cash/traveler's checks
- Phone numbers for your financial planner, insurance agents, stockbroker, attorney, etc.
- Account numbers for credit union, bank, credit card, investment accounts; Social Security numbers for all family members.
- Copies of documents in your safe deposit box.
- Copies of last three years' tax returns
- Current backup of computer file
- Copies of driver's license numbers