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Emergency Checklist – What Do Your Loved Ones Need to Know if Something Happens to You?

This is an immediate action plan to help your loved ones immediately take action upon notification of your death or incapacity. It is not an all-inclusive list, but merely a guide to follow. Create your own emergency checklist with enough space to give them detailed instructions about what needs to be done immediately! Add any items that are specific to your own life and situation.

Who to Call or Notify? (e.g. family, friends, employer, employees, funeral director, lawyer, neighbors, etc.)

Name	Telephone Number	Who is This Person?	Called?	Comments
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	

Secure house & Assets (e.g. valuables, jewelry, electronics, firearms, computers, cash, etc.)

Item to Secure	Description	Where did you put it?	Done?	Comments
Firearms			<input type="checkbox"/> Yes	
Cash			<input type="checkbox"/> Yes	
Jewelry			<input type="checkbox"/> Yes	
Electronics			<input type="checkbox"/> Yes	
Computers			<input type="checkbox"/> Yes	
Change Locks			<input type="checkbox"/> Yes	
Home Safe/Lockbox			<input type="checkbox"/> Yes	
			<input type="checkbox"/> Yes	
			<input type="checkbox"/> Yes	

Make list of Debts (e.g. Mortgages, Lines of Credit, Vehicle Loans, Student Loans, Credit Cards, IOUs, etc.)

Asset	Name of Creditor	Account Number	Amount Owed	Phone Number & Details
Mortgage			\$	
Line of Credit			\$	
Student Loans			\$	
Credit Cards			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	

Insurance Policies

Asset	Company Name	Policy #	Phone Number	Comments
Life Insurance				
Disability Insurance				
Long-Term Care				
Health				
AD&D				
Other				

Social Media (e.g. Facebook, LinkedIn, Twitter, Instagram, personal websites, etc.)

Account Info	Website	UserName	Password	Comments
Email 1:				
Email 2:				
Email 3:				
Facebook				
LinkedIn				
Twitter				
Instagram				
Personal Website				
Business Website				
Other				

Letters of Love and final instructions or explanations to loved ones, Trustee, Personal Representative, etc.

Name of person	Relationship of this person to you?	Instructions, if any	Called Left Message	Comments
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	

Who is to take care of your pet(s)?

Name of person	Name & Type of Pet	Instructions, if any	Called Left Message	Comments
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	
			<input type="checkbox"/> Yes <input type="checkbox"/> Left Message	

Other Important Information:

1. If you would like to provide your loved ones with a more comprehensive list of everything your loved ones need to know about you, consider buying a copy of my book entitled, “**My “Everything” File®**,” which contains a 330-page workbook of important information covering 90 different topics, and which will guide you through the process of getting this information to your loved-ones. In addition to a more-detailed version of the above checklist, it also provides you with suggestions for creating a family legacy of family history, favorite family stories, life lessons learned, your medical history, and so much more information, you’ll wonder that your head doesn’t explode! If you think it is a lot of work to do it, imagine how much harder it will be for your loved ones to try to figure out what does and does not apply to you! They will thank you for your thoughtfulness in providing all this information to them.
2. Copies of **My “Everything” File®** are available for purchase for \$29.95 (plus shipping & taxes) at www.MyEverythingFile.com or on www.Amazon.com. A fillable PDF version of the book will be available for purchase soon.
3. Or, consider checking out the online workbook/course version of the book, which walks you through the entire process as well as enabling you to create a video legacy of you telling your favorite memories and family stories for future generations of your loved ones to enjoy. It is available for \$97.00 and can be accessed at www.MyEverythingFile.net/JerryS.

Thank you,

Jerrold E. Slutzky