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EMERGENCY INFO BINDER

How to Avoid the Scavenger Hunt When You Pass

FIRST THINGS FIRST

- I'm not an attorney or paralegal. Chances are others in room are not either.
- Presentation is based on my personal experience as spouse, daughter & volunteer
- Binder requires one page of a bulleted item, not the entire contract.
- Be sure your executor, children, spouse, etc knows what's in it and where you store it
- Flashdrive updated as needed with spreadsheet of accounts, passwords, etc
- Keep originals in a safe place. Binder should have only copies.
- Grab binder as part of your 'ditch bag' to leave if your home catches fire.
- You will need to update to keep your binder current.
- Useful as one-stop place for info you need for airline reservations etc.

AUTOMOBILE, RV, SCOOTER, GOLF CART, BOAT

- Copy of titles for all vehicles**
- Copy of Vehicle Registration**
- Copy of Proof of Vehicle Insurance**
- If you use an agent: their office info**
- Receipt listing RV/Trailer storage/Boat slip**
- Location of any spare keys for vehicle**
- Location of original titles (i.e. lockbox)**

PERSONAL INFO FOR EACH PERSON

- Copy of certified birth certificate
- Discharge papers from military - DD214
- Copy of Social Security Card
- Copy of Social Security Benefit
- Copy of Medicare Card (front/back)
- Copy of monthly Pension
- Copy of Letter of Lifetime Benefit

HOME/RENTAL INFO

- Mortgage letter showing company info and loan #
- Annual copy of escrow account disclosure statement
- Homeowners/Renters insurance policy summary
- Pima County Assessors' Notice of Value
- Annual Property Tax Statement
- Front Page of Warranty Deed showing the recording of deed
- HOA Annual Dues Invoice
- GVR Member Dues Invoice
- Copy of Home Warranty Info
- Storage Unit info located off-site
- Landlord Info if you're a renter

LIFE / ACCIDENTAL DEATH INSURANCE

- Copy of all Certificate of Insurance Policies
- Policy info included as part of retirement compensation
- Credit union may include a small plan as part of their service
- Travel Certificate of Insurance - listing coverage and info
- Accidental Death/Disability policy
- Prepaid funeral/cremation/composting services.
- Group insurance coverage from your former employer

LOCK BOX

- **Copy of Safe Deposit Box Record**
- **Note where to find lockbox keys**
- **Update info as to who has access etc as needed**
- **Make sure location of box is stated on record.**

BIRTH/MARRIAGE/DIVORCE/ADOPTION

- **Copy of certified Certificate of Live Birth**
- **Copy of certified License and Certificate of Marriage(s)**
- **Copy of certified Dissolution of Marriage and settlement agreement**
- **Certified copy of spouse's Certificate of Death**
- **Keep copies of the documents in binder. Note location of original copies.**
- **Copy of Adoption Certificate (if applicable)**

MONEY, DINERO, MOOLA

- Account Summary of all accounts:
- Checking, Savings, Investments - Account number/ location
- Copy of Certificate of Shares
- Bitcoin, gold bars - info needed to find and manage
- Appraisals of artwork, jewelry, antiques, valuables
- Provide Password Spreadsheet on flash drive in lock box
- Copies of front & back of all credit cards, ATM cards
- Contact info for personal finance manager
- Latest tax return for federal and state.

UTILITIES/CONTRACTS

- Copy of cell phone/internet/landline/cable/DISH
- Copy of electricity provider info
- Copy of info for trash/recycle provider
- Contact info for provider of water/sewer
- Copy of Pest Control coverage
- Copy of info for provider for gas (i.e. Southwest Gas)
- Info for Lawn care providers including pre-emergent spraying
- Contact info for house keeper/window washer if on a scheduled basis
- Solar panel contract info
- Snow removal contract if your home is in snow country

SUBSCRIPTIONS

- Copy of AAA/AARP/ type memberships
- Copy of Sirius XM/Apple Music type coverages
- Costco membership info
- Newspapers- delivered and online subscriptions
- List of Apps you subscribe to with auto renewal
- Amazon Prime Membership
- Youtube/Streaming TV type subscriptions
- Exterior Water Service Line contract

WHEN THE TIME COMES.....

- Location of Will, Trust, Attorney's contact info - Avoid probate and do something now
- Preference for burial location, funeral home
- Embalm, cremation, soil transformation
- Special requests for service - viewing, music, scripture, Celebration of Life etc
- Draft of your obituary - grandchildren may not know all you've done
- Preferred Realtor contact info for the sale of your home.
- Estate Sale Team preference - will your family want to handle garage sale?
- A list of people/organizations to notify/uniforms that need returning etc
- Where should your mail be forwarded
- Instructions for the continued care of your pets

CONTACT INFO

- AZ MVD - www.servicearizona.com
- Social Security - www.ssa.gov
- Medicare - www.medicare.gov
- Assessor's office - www.asr.pima.gov
- Recorder's office - www.recorder.pima.gov www.recorder.pima.gov/FraudNotify
- Certified copies - www.vitalchek.com (birth, death, marriage, divorce)
- United Methodist Church Estate & Patio Sales
- Good Shepherd United Church of Christ Patio Sales
- Desert Hills Lutheran Church Estate Sales Team
- GV Sahuarita Association of Realtors - www.gvsar.com