



Esther Schwartz Zelmanovitz, PLLC  
Estate Planning • Elder Law • Medicaid • Probate

## EMERGENCY INFORMATION AND IMPORTANT DOCUMENTS

Please keep this in a secure location.

This Document contains important information including your important personal information, your primary advisors, and a detailed list of where you store your important records and papers. This list will assist your loved ones in the event of your death or disability. Keep this list at home along with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to the family member, your executor, and/or your attorney.

Remember to update this document at least once a year to ensure its accuracy.

Enter Date this Document was Updated:

### Section A - Personal Information

Full Legal Name	
Street Address	
City, State Zip Code	
Social Security Number	
Date of Birth	

Name of Primary Care Physician	
Phone Number	

Name of Dentist	
Phone Number	

Medical Insurance Provider	
Plan Name and ID Number	

Medical Insurance Provider	
Plan Name and ID Number	

Pharmacy Name and Address	
Phone Number	

## Section B - Professional Contacts

**Attorney:**

Name	
Company Name	
Address	
Email Address	
Phone Number	

**Accountant/CPA:**

Name	
Company Name	
Address	
Email Address	
Phone Number	

**Financial Advisor:**

Name	
Company Name	
Address	
Email Address	
Phone Number	

**Personal Banker:**

Name	
Company Name	
Address	
Email Address	
Phone Number	

**Insurance Agent:**

Name	
Company Name	
Address	
Email Address	
Phone Number	

**Executor of Will:**

Name	
Email Address	
Phone Number	

### Section C – Online Accounts

Company Name	Website Address	Username	Password	Account #

### Section D – Important Documents

**Part I:** Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box). You may wish to first review the items in Part II, before specifying the locations in this Part I.

Location A	
Location B	
Location C	
Location D	
Location E	

**Part II:** For each item in this Part II, indicate where you keep your documents and information by checking the letter that corresponds to the correct location designated in Part I.

Estate Planning Documents	Location:				
	A	B	C	D	E
Health Care Directives (Health Care Proxy, HIPAA Authorization, Living Will)					
Durable Power of Attorney					
Last Will and Testament					
Trust(s)					

## Part II cont.:

### Location:

Personal Records	A	B	C	D	E
Adoption certificates					
Birth certificate					
Death certificates of family members					
Diplomas					
Divorce/Separation papers					
Driver's License					
Funeral Pre-plan, Deed to Burial Plot, Funeral and Burial Instructions					
Marriage certificate					
Medical records					
Military records					
Naturalization papers					
Passport					
Social Security card					

Deeds / Titles / Registrations	A	B	C	D	E
Auto registration					
Appraisals					
Cooperative Unit Stock and Proprietary Lease / Maintenance Bill					
Deeds / Mortgage / Satisfaction of Mortgage					
Keys to home, car, buildings, and other locks. If combination lock, code: _____					
Post Office box key					
Safe deposit box key and location Home Safe combination					
Vehicle and Boat Titles					

## Part II cont.:

Banking / Investment / Financial Records	A	B	C	D	E
Appraisals					
Bank Account Records					
Business Documents					
Credit Card Accounts					
Income tax returns and gift tax returns					
List of Assets (complete list of all property, bank accounts, etc.)					
Loan Documents and Debts Owed (as lender or creditor)					
Retirement Account Documents 401(k), 457, 403(b), IRA, Pension Plans					
Stocks and Bonds					

Insurance Policies	A	B	C	D	E
Auto					
Health					
Home, Property and Casualty					
Life					
Long Term Care					
Other, specify:					

Additional Notes:

---



---



---



---

These materials are provided for general information and education purposes only and are not intended to provide legal advice. They may or may not include all of your individual personal documents and information that may be needed in the event of incapacity or death. Nothing in this document should be taken as legal advice for any individual case or situation. This information is not intended to create and does not constitute an attorney-client relationship. Should you wish to obtain legal advice regarding your particular situation, please call our office at (516) 466-9455.