

CRITICAL INFORMATION IN CASE OF EMERGENCY OR SUDDEN DEATH



FAMILY WEALTH
SOLUTIONS
CONCURRENT

		Self	Spouse
Personal Information			
Full Name			
Passwords Location			
Home Address			
Contact Information	Cell		
	Work		
	Home		
	Email		
Date of Birth			
Social Security Number (Last four digits)			
Driver's License Number			
Vehicle	License Plate		
	Make		
	Model		
Passports	Location		
	Numbers		
Physicians	Name		
	Address		
	Phone		
	Name		
	Address		
	Phone		
Medical Details	Blood Type		
	Allergies		
	Major Medications		
Employer or Office Contacts	Company Name		
	Contact Name		
	Contact's Title		
	Contact's Number		

Family Wealth Solutions provides all investment advisory services through Concurrent Investment Advisors, LLC, an SEC Registered Investment Advisor. Concurrent Investment Advisors d/b/a Family Wealth Solutions are not affiliated companies.

Family Information

Children

Name	Name	Name
School	School	School
Teacher	Teacher	Teacher

Parents

Name		
Home Address		
Contact Information	Cell	
	Work	
	Home	
	Email	

Pets

Name and Type	
Veterinarian	Name
	Phone

Other Contacts

Family Friends	Name	
	Phone	
Pastor	Name	
	Phone	

Advisors Information

Financial Planner	Name		
	Phone		
	Email		
Attorney	Name		
	Phone		
	Email		
Accountant	Name		
	Phone		
	Email		
Property/Casualty Insurance Agent	Name		
	Phone		
	Email		

Financial Information

Bank/Credit Union	Name		
	Phone		
Bank Account Numbers	Checking		
	Savings		
	Other		
Credit Card Company	Name		
	Phone		
	Account Number		
Credit Card Company	Name		
	Phone		
	Account Number		
Investment Account	Firm Name		
	Phone		
	Account Number		
	Account Type		
Mortgage	Institution Name		
	Account Number		

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Consumer Loans	Home Equity Provider		
	Account Number		
	Car Loan Provider		
	Account Number		

Insurance Information

Auto Insurance	Insurer		
	Policy Number		
	Contact Information		
	Location of Policy		
Homeowners	Insurer		
	Policy Number		
	Contact Information		
	Location of Policy		
Liability "Umbrella" Coverage	Insurer		
	Policy Number		
	Contact Information		
	Location of Policy		
Life Insurance Policies <small>(Don't forget Accidental Death Policies you may have through AAA, VISA, etc.)</small>	Insurer		
	Agent		
	Contact Information		
	Location of Policy		
Disability	Insurer		
	Policy Number		
	Contact Information		
	Location of Policy		
Long-Term Care	Insurer		
	Policy Number		
	Contact Information		
	Location of Policy		

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Estate Information

Will Executor	Name		
	Relationship		
	Phone		
Wills and Documents (Includes Power of Attorney, Executor, Trustee, and Medical Directives for Physicians)	Location in Home		
Medical Power of Attorney	Name		
	Phone		
Financial Power of Attorney	Name		
	Phone		
Our Home(s) Special wishes for decisions about home, especially if older children are included.			
Our Other Real Property Special wishes for decisions about property, especially if older children are included.	Location		
Real Estate Deeds, Mortgages, Title Policies, Leases, Surveys, or plans	Location		
Jewelry Reference wills or any specifics of who should get what			
Stock Certificates or other Securities Reference wills or any specifics of who should get what			
Family Antiques Reference wills or any specifics of who should get what			
Burial Wishes	Specific Wishes		
	Burial Location		
	Pre-made arrangements		
	Location of instructions/ contracts		
Charitable Causes	Reference wills or any other specifics		
Family Love Letters	Location		

Privacy Information

Important Papers, Insurance Policies Where are they located - where in the house, safe, attorney's office, your office?			
Special arrangements, immediate arrangements, or contacts for care of children, pets, etc., as well as referencing instructions located in wills			
Safe	Combination		
	Location		
Safe Deposit Box	Signature Holder(s)		
	Location		

Miscellaneous Information

Birth Certificates	Location		
Marriage Certificates	Location		
Adoption Papers	Location		
Naturalization Papers	Location		
Military Discharge Papers	Location		
Partnership and other Business Agreement Contracts	Location		
Employee Benefit Plans and Statements	Location		
Other specific instructions or concerns?			

In Case of Emergency

Contact List

Emergency: 911			
Hospital			
Police Department			
Fire Station			
Contact 1	Name		
	Relationship		
	Address		
	Phone		
Contact 2	Name		
	Relationship		
	Address		
	Phone		

Emergency Meeting Places

Within the Neighborhood	Address		
	Landmark		
	Phone		
Outside the Neighborhood or Out of Town	Address		
	Landmark		
	Phone		



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