

Emergency Records Organizer

Purpose of Keeping Emergency Records

Record information that will be needed in one of the following situations:

- You or a family member is suddenly incapacitated
- You or a family member has a medical emergency
- Someone steals your wallet or critical identity information
- There is a fire or other sudden damage to your property
- You simply forget where critical information is recorded or stored

Using the ERO forms

There are 21 separate Word documents on the CD and on the web. There is an instruction sheet, a table of contents and 19 information Sections.

Copy all of the Word documents to your hard drive in a folder of your choice.

Select a Section and fill in the requested information. Save the completed form in a separate folder from the originals.

Successful completion of the Sections will require you to use your computer, your scanner, your digital camera and burning files to CD's.

Confidentiality of the Information is an Issue

Much of the data is highly confidential and must not fall into the wrong hands.

The first 11 Sections contain “sensitive” information but not confidential. They can be printed and distributed to other family members.

The last 8 Sections are considered “confidential” information and should be stored in a secure location.

Format the Records to fit your needs

Sections are comprised of Word Tables that cover a collection of information.

Expand or delete Tables or entire Sections as desired.

You can navigate within a Table using the Tab key, but you must use the mouse to move to a new Table

If you make a mistake, press “Ctrl Z” to undo your keystroke. Press it multiple times to undo several keystrokes.

Objective of the Exercise

You don't have to complete every Section to be successful. Any information is better than nothing.

Don't worry about information such as magazine subscriptions, etc. It adds to the information collection effort and they aren't that critical

If you cannot envision a situation where the information would be really helpful, then don't worry about it.

Don't try to complete all Sections at once. It's a big job so work on one Section at a time.

Plan to check the information each year when you prepare your income taxes. Modest changes can be performed quickly on your computer.

Details of each Section

Let's walk through each Section to better understand the information.

If you think of something that is missing – please suggest it to the group.

Remember, every person's needs are different and your end product will be quite different from the generic forms.

Table of Contents

- Sec 1 - Emergency Contact Information
- Sec 2 - Medical Information
- Sec 3 - Personal Information
- Sec 4 - Insurance
- Sec 5 - Recurring Payments
- Sec 6 - Wills, Trust and Power of Attorney
- Sec 7 - Professional Advisors
- Sec 8 - Other Important Documents
- Sec 9 - Memberships
- Sec 10 - Life Events
- Sec 11 - Safety Deposit Box and Home Safes
- Sec 12 - Personal Confidential Information
- Sec 13 - Cards in Wallet or Purse
- Sec 14 - Checking and Savings Accounts
- Sec 15 - Investment Accounts
- Sec 16 - Sources of Income
- Sec 17 - Real Estate and Mortgages
- Sec 18 - Jewelry and Valuables
- Sec 19 - Websites and Passwords

Options for Storing the Information

Least Secure:

- Store all Sections in a folder on your computer.
- Copy to a CD for backup purposes.
- Print all Sections and place in 3 ring Binder.
- Give copies of CD or Binder to your family members.

Most Secure:

- Copy Sections 1-11 to a CD and retain in home office.
- Copy Sections 12-19 to a CD and store in Safety Deposit Box or home safe. Delete files from computer.
- Print Sections 1-11 and place in a 3 ring Binder.
- Give copies of CD or Binder containing Sections 1-11 to your family members.