



Creating an Emergency Financial Kit



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Tips to Creating an Emergency Financial Kit

- 1) Complete all forms in this booklet.
- 2) Collect all supporting documentation. If there are documents that you presently do not have but should, i.e. will, life insurance, etc., take the necessary steps to obtain these items immediately.
- 3) Review all documents for accuracy and to be sure the document is still in effect. For example, if you are a home owner, be sure that your property coverage is still adequate and take photographs of valuable personal property. If you are a renter, be sure that your lease reflects your current rent.
- 4) Keep the completed forms and documentation in a safe place, i.e. waterproof/fireproof container.
- 5) Review and update the forms at least once a year.

Personal Household Information

Complete a form for EACH person in the home.

Name: _____
(First) (Middle) (Last)

Age: _____ Date of Birth: _____

Address: _____
(Apartment No.) (Street No.) (Street Name) (Fire No.)

(City) (Province) (Postal Code)

Mailing Address: (if different than above)

Telephone: _____ Personal Cell Phone: _____

Work/School Name: _____

Work/School Address: _____

Work/School Phone: _____

Work/School Cell Phone: _____

Work/School Email: _____

Professional Advisors

Accountant Name _____

Company Name _____

Address _____

Phone _____

Fax _____

Email _____

Additional Information _____

Lawyer Name _____

Company Name _____

Address _____

Phone _____

Fax _____

Email _____

Additional Information _____

Financial Planner Name _____

Company Name _____

Address _____

Phone _____

Fax _____

Email _____

Additional Information _____

Other: Contact Name _____

Company Name _____

Address _____

Phone _____

Fax _____

Email _____

Additional Information _____

Private Security / Access Information

In this electronic age, many documents and accounts are available online. While this provides convenience, it is important to ensure that you have a hard copy or paper documentation as well. If you bank or pay your bills electronically, be sure to periodically print records from these accounts.

In addition, electronic payments, credit/debit cards and software programs for taxes and other finances require a password, PIN and/or personal security question as an extra means of protection. It is important to keep these access codes secure. DO NOT include a list of passwords or PIN numbers in your emergency financial kit.

FINANCIAL ACCOUNT INFORMATION (bank, credit union)

Name of Institution: _____

Address: _____

Phone: _____

Name of Account Holder: _____ Account Number: _____

Name of Institution: _____

Address: _____

Phone: _____

Name of Account Holder: _____ Account Number: _____

INSURANCE POLICIES

Firm / Institution Name: _____

Address: _____ Phone: _____

Name of Policy Holder: _____ Account Number: _____

Type of Policy: _____ Coverage Period: _____ Claims Phone: _____

Firm / Institution Name: _____

Address: _____ Phone: _____

Name of Policy Holder: _____ Account Number: _____

Type of Policy: _____ Coverage Period: _____ Claims Phone: _____

Checklist of Important Legal and Financial Documents

Please review the list of important documents below and check if you have the document, if you need to obtain the document or the document does not apply to your household. Keep a copy of the forms included in this kit along with a copy of the following important documents in a safe place. You may want to store original documents in a safety deposit box. It is suggested you include a date on each line as you collect and obtain your necessary documents. This will help you track your progress as you work through the list.

Important Documents That Apply to My Family	Have	Need	N/A
1. Birth Certificate(s)/Adoption Papers			
2. Marriage Licence			
3. Divorce Papers			
4. Social Insurance Card(s)			
5. Passport/Green Card			
6. Naturalization Documents			
7. Will/Living Will			
8. Power(s) of Attorney (personal/property)			
9. Mortgage or Real Estate Deeds of Trust			
10. Vehicle Registration/Ownership Papers			
11. Health Card			
12. Health Insurance ID Card(s)			
13. Record of Immunizations/Allergies			
14. List of Necessary Medications			
15. Disabilities Documentation			
16. Dental Records / Child Identity Cards / DNA Swabs			
17. List of Necessary Medications			
18. Disabilities Documentation			
19. Previous Year's Tax Returns			
20. Property Tax Statement			
21. Personal Property Tax (i.e. Car Tax)			
22. Bank/Credit Union Statements			
23. Credit/Debit Card Statements			
24. Investment / Retirement Accounts (Stocks, Bonds, Mutual Funds, T-Bills, GICs, RESPs)			
25. Recent Pay Stubs from All Sources of Income			
26. Government Benefits (OAS, GIS, CPP, Ontario Works, Veterans)			
27. Alimony Income			
28. Child Support Income			
29. Professional Appraisals of Personal Property			
30. Rewards Accounts (e.g., Frequent Flyer, Hotel Rewards)			
31. Mortgage Statement			
32. Lease			
33. Utility Bills (Electric, Water, Gas, Telephone)			
34. Car Payment			
35. Student Loan			
36. Alimony Payments			
37. Child Support Payments			
38. Elder Care Facilities			
39. Other Debt			
40. Property Insurance			
41. Rental Insurance			
42. Auto Insurance			
43. Life Insurance			
44. Other			