



FINANCIAL PREPAREDNESS CHECKLIST

Important Documents to Copy and Store Securely

- ☐ Driver's license, passport, birth certificates, Social Security cards
- ☐ Insurance policies (home, renters, auto, health, life)
- ☐ Bank and credit card account information
- ☐ Loan documents (mortgage, car, student loans)
- ☐ Investment records (401(k), IRAs, brokerage accounts)
- ☐ Property records (deeds, titles, leases)
- ☐ Medical records, prescriptions, insurance info
- ☐ Legal documents (wills, powers of attorney, custody, marriage/divorce papers)

Accounts to Track

- ☐ Bank accounts with institution contact info
- ☐ Credit cards (with issuer contact and last 4 digits)
- ☐ Loans and due dates
- ☐ Recurring subscriptions and auto-billed services
- ☐ Retirement and investment accounts (with access instructions)

Due Dates & Bill Management

- ☐ Maintain a bill calendar for monthly obligations
- ☐ Set up alerts for due dates and suspicious activity
- ☐ Enable auto-pay for essential accounts (if reliable funding exists)
- ☐ Keep a backup payment method
- ☐ Know which creditors offer hardship or disaster relief plans

Security & Emergency Access

- ☐ Use a password manager or secure written password list
- ☐ Enable multi-factor authentication on accounts
- ☐ Create a trusted contact list for account access during emergencies
- ☐ Give a trusted contact copies or teach them how to find this information
- ☐ Store emergency cash in small denominations
- ☐ Store physical copies in a waterproof bag and keep in a secure and easily accessible place