

# susanhuntlaw

Wills • Trusts • Estate Planning • Probate

501 Simpson St. • Greensboro • NC • 27401

336-373-9877 • info@susanhuntlaw.com

www.susanhuntlaw.com

## IN CASE OF EMERGENCY MEMORANDUM

### Give Your Loved Ones the Information They Need

This memorandum will provide your loved ones with essential financial and health care information they will need if something happens to you. Provide as much detail as possible because leaving out important details will make it more difficult for your loved ones to care for you in case of an emergency. Also, remember update this memorandum as information changes.

Keep this document in a safe place AND let your loved ones know where to find and/or how to access this document.

#### PERSONAL INFORMATION

Full Legal Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Driver's License Number: \_\_\_\_\_

#### LOCATION OF IMPORTANT DOCUMENTS

Driver License: \_\_\_\_\_ Marriage License: \_\_\_\_\_

Birth Certificate: \_\_\_\_\_ Divorce Decree: \_\_\_\_\_

Social Security Card: \_\_\_\_\_ Tax Returns: \_\_\_\_\_

Passport: \_\_\_\_\_ Business Agreements: \_\_\_\_\_

Military ID: \_\_\_\_\_ Estate Plan Documents: \_\_\_\_\_

Citizenship Documents: \_\_\_\_\_ Other: \_\_\_\_\_

Real Estate Deeds: \_\_\_\_\_ Vehicle Titles: \_\_\_\_\_

#### MILITARY INFORMATION

Branch of Service: \_\_\_\_\_ Rank/Rate: \_\_\_\_\_

Date of Initial Entry to Military Service: \_\_\_\_\_

Date of Retirement or Separation from Service: \_\_\_\_\_

Military Pension Amount: \_\_\_\_\_ Direct Deposit:  Yes  No

Survivor Benefit Plan:  Yes  No Survivor: \_\_\_\_\_ Amount: \_\_\_\_\_

**MEDICAL INFORMATION**

Primary Health Insurance Provider: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Location of Insurance Card: \_\_\_\_\_

Secondary Health Insurance Provider: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Location of Insurance Card: \_\_\_\_\_

Medicare Number: \_\_\_\_\_ Location of Medicare Card: \_\_\_\_\_

Medicaid Number: \_\_\_\_\_ Location of Medicaid Card: \_\_\_\_\_

Primary Care Provider: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Secondary Provider: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Eye Doctor: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Dentist: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Preferred Hospital: \_\_\_\_\_

**MEDICAL HISTORY**

Height: \_\_\_\_\_ Weight: \_\_\_\_\_ Blood Type: \_\_\_\_\_

Allergies and/or Medical Conditions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Medications (Name, Dosage, Prescribing Doctor):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Surgeries, Hospitalizations, Major Illnesses (Type and Date):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Family Medical History (Immediate Relatives):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PETS**

Pet Names: \_\_\_\_\_

Veterinarian: \_\_\_\_\_

Pet Insurance:  Yes  No Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Location of Insurance Policy/Card: \_\_\_\_\_

**INCOME & FINANCES**

Salary/Wages: \_\_\_\_\_

Direct Deposit:  Yes  No

Social Security: \_\_\_\_\_

Direct Deposit:  Yes  No

Pension: \_\_\_\_\_

Direct Deposit:  Yes  No

Retirement Benefits: \_\_\_\_\_

Direct Deposit:  Yes  No

Annuity: \_\_\_\_\_

Direct Deposit:  Yes  No

Rental Property Income: \_\_\_\_\_

Direct Deposit:  Yes  No

Business Income: \_\_\_\_\_

Direct Deposit:  Yes  No

Disability: \_\_\_\_\_

Direct Deposit:  Yes  No

Interest or Royalty: \_\_\_\_\_

Direct Deposit:  Yes  No

Military Benefits: \_\_\_\_\_

Direct Deposit:  Yes  No

Other: \_\_\_\_\_

Direct Deposit:  Yes  No

Bank or Credit Union: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Retirement Account Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Brokerage Account Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Annuity Issuer: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Other: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Other: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

Other: \_\_\_\_\_

Account Number: \_\_\_\_\_

Online Account Username: \_\_\_\_\_

Password: \_\_\_\_\_

**BILLS**

Mortgage/Rent Estimated Amount: \_\_\_\_\_ Lender/Landlord: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Electric/Gas/Oil: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Water Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Landline Phone Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cell Phone Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Internet Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Cable/Satellite TV Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Amount: \_\_\_\_\_ Service Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

**INSURANCE**

Homeowners/Renters Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Auto Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Life Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Long-Term Care (LTC) Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Life Insurance with LTC Benefit Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Disability Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Insurance Company: \_\_\_\_\_ Agent: \_\_\_\_\_

Premium Amount and Frequency (monthly/annually): \_\_\_\_\_

Policy Number: \_\_\_\_\_ Method of Payment: \_\_\_\_\_

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

**DEBT & CREDIT CARDS**

Home Loan Number: \_\_\_\_\_ Lender: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Auto Loan Number: \_\_\_\_\_ Lender: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Personal Loan Number: \_\_\_\_\_ Lender: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Student Loan Number: \_\_\_\_\_ Lender: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

\_\_\_\_\_ Loan Number: \_\_\_\_\_ Lender: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Card Issuer: \_\_\_\_\_ Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Card Issuer: \_\_\_\_\_ Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Card Issuer: \_\_\_\_\_ Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Card Issuer: \_\_\_\_\_ Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Card Issuer: \_\_\_\_\_ Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

**SUBSCRIPTIONS & MEMBERSHIPS**

Type: \_\_\_\_\_ Amount: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Type: \_\_\_\_\_ Amount: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Type: \_\_\_\_\_ Amount: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

Type: \_\_\_\_\_ Amount: \_\_\_\_\_ Autopay:  Yes  No

Online Account Username: \_\_\_\_\_ Password: \_\_\_\_\_

**ONLINE PRESENCE & SOCIAL MEDIA**

**Personal Devices**

Source	Login	Username	Password
Cell Phone			
Tablet			
Laptop Computer			
Desktop Computer			
External Hard Drive			

**Email Accounts**

Source	Login	Username	Password
Email Address			
Email Address			
Email Address			

**Storage**

Source	Login	Username	Password
iCloud			
Google Drive			
OneDrive			
Dropbox			

**Social Media**

Source	Login	Username	Password
Facebook			
Instagram			
Twitter			
LinkedIn			
Pinterest			
YouTube			
TikTok			
Snapchat			
Reddit			

**Streaming**

Source	Login	Username	Password
Netflix			
Hulu			
Disney+			
HBO			
Apple TV			
YouTube TV			
Sling TV			
Acorn TV			
Direct TV			
Showtime			

**Travel**

Source	Login	Username	Password
AAA			
Uber			
Lyft			
_____			
Airline Miles			
_____			
Hotel Rewards			



**Virtual Connection**

Source	Login	Username	Password
Zoom			
Skype			
GroupMe			
WhatsApp			

**Shopping**

Source	Login	Username	Password
Amazon			
PayPal			
Venmo			
Etsy			
eBay			
Costco			
Sam's Club			

**COMMON SECURITY QUESTIONS**

What city were you born? \_\_\_\_\_

What is your mother's maiden name? \_\_\_\_\_

What was the street your lived on as a child? \_\_\_\_\_

What high school did you attend? \_\_\_\_\_

What was the make of your first car? \_\_\_\_\_

What was the first concert you attended? \_\_\_\_\_

Where did you meet your spouse? \_\_\_\_\_

What is the name of your favorite pet? \_\_\_\_\_

What is your favorite movie? \_\_\_\_\_

\_\_\_\_\_ ? \_\_\_\_\_

\_\_\_\_\_ ? \_\_\_\_\_

\_\_\_\_\_ ? \_\_\_\_\_

\_\_\_\_\_ ? \_\_\_\_\_

\_\_\_\_\_ ? \_\_\_\_\_

**FINAL WISHES**

Prepaid Funeral Plans:  Yes  No

Funeral Home That Issued the Plan: \_\_\_\_\_

Location of Prepaid Plan Agreement: \_\_\_\_\_

If Funeral Is Not Preplanned, Funeral Home Preference: \_\_\_\_\_

Wish to Be Buried:  Yes  No

Wish to Be Cremated:  Yes  No

Other: \_\_\_\_\_

I Own A Cemetery Plot:  Yes  No

Location of Cemetery Plot: \_\_\_\_\_

Type of Casket Wanted: \_\_\_\_\_

Type of Grave Marker Wanted: \_\_\_\_\_

Inscription on Grave Marker: \_\_\_\_\_

Ceremony Preferences: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Poems, Verses, Scripture, Prayers, or Other Readings: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Songs or Music: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Special Instructions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_