

# The Damon Key Leong Kupchak Hastert Emergency Checklist



By Diane D. Hastert

**E**veryday life is complicated. When we die or become incapacitated, someone has to unravel the puzzles we have created. It can be heartbreaking, time consuming and expensive. This is how to avoid the disarray.

First, everyone should have current, appropriate estate documents. These may include wills, trusts, durable powers of attorney, and advanced health care directives.

Second, if you complete the following checklist, you will save those responsible for sorting the fragments of your life countless hours. We recommend: (1) this information be stored only in a single hard copy or on a flash drive kept in a safe deposit box or other secure storage; and (2) you place a letter in your files in your attorney's office stating where the information is located and how it can be accessed. The information should be updated periodically. I have actually compiled this information. Having it organized affords tremendous peace of mind.

- PEOPLE**
  - o Who should be notified when you are incapacitated or die?
    - For each, list contact information<sup>1</sup> and their relationship to you.
- PERSONAL IDENTIFYING INFORMATION**
  - o Birth certificate – where is original or copy?
  - o Passport:
    - Issuing country?
    - Number?
  - o Social Security:
    - Name?
    - Number?
  - o Drivers' license:
    - Issuing state?
    - Number?
  - o Global Entry number?
  - o Military Identification number?
    - Location of DD-214 entitling former military to burial benefits?
- ATTORNEYS**
  - o List each of your attorneys and their contact information.
  - o Location of your current will; trust(s); durable power of attorney; and advanced care directive?
- ACCOUNTANT/TAX PREPARER**
  - o List each of your accountants and tax preparers and their contact information.
  - o Locations of copies of your last 5 years' tax returns?
- FINANCIAL ADVISORS & INVESTMENTS**
  - o List each of your financial advisors and their contact information.
  - o List each of your investment accounts and their contact information..
    - For each, provide log-in identification and password.
  - o Location of inventory of your investments, assets, liabilities, etc.?
- BANK/ FINANCIAL INSTITUTION ACCOUNTS**
  - o For each account:
    - Name of institution?
    - Branch where account was opened?
    - Name(s) on account?
    - Number of account?
    - Type of account?
    - Log-in identification and password?
    - PIN number?
- SECURED STORAGE**
  - o Safe deposit box:
    - Location?
    - In whose name(s)?
    - Location of key?
  - o Safe:
    - Location?
    - Combination?
    - Location of key?
  - o Storage Unit:
    - Location?
    - Access code?
    - Combination?
    - Location of key?
- INSURANCE POLICIES**  
(auto; homeowners; excess liability; life; health; long term care; etc.)
  - o For each policy:
    - Name of carrier?
    - Policy number?
    - Contact information?
    - Location of copy of policy?
- AUTOMOBILE TITLE**
  - o For each:
    - Make/model/year?
    - Customary location?
    - Location of title?
- CELL PHONE/TABLET ACCOUNTS**
  - o For each:
    - Device?
    - Number?
    - Name on account?
    - Carrier?
    - Contact information?
- MORTGAGE/LONG TERM DEBT**
  - o For each:
    - Holder of debt?
    - Contact information?
    - Location of promissory notes, mortgages, etc.?
- CHARGE ACCOUNTS**
  - o For each, list:
    - Name of issuer?
    - Name on account?
    - Account number?
    - Contact information?
- RECURRING OBLIGATIONS**
  - o For each, list:
    - Name of payee?
    - Whether paid automatically or manually?
    - If automatic, contact information for cancellation/modification.
- DOCTORS**
  - o For each, list:
    - Name?
    - Contact information?
- MEMBERSHIPS**
  - o For each, list:
    - Name?
    - Contact information?
- SUBSCRIPTIONS**
  - o For each, list contact information for cancellation/modification.

<sup>1</sup> Contact information should include telephone number, address, mobile number and email address.

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