



Plan Smart. Live Well.

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Financial Emergency Kit... Why do YOU need one?

When illness or tragedy strikes your family, your **emergency contact and/or your spouse** is expected to be able to handle your affairs just as you would. If asked to serve in this capacity, an emergency contact might utter, “I hate **going through someone else’s things** looking for important papers.” And your spouse might be **totally clueless** thrown into this situation.

If your household is like most, you **have important papers and documents stashed away** in a somewhat organized place known only to you and accessible by you. So while your emergency contact and/or spouse is **dealing with emotions and other traumatic issues**, they are **trying to figure out what needs to be done** to protect you and your family.

Because we’ve seen the serious problems that can occur when a family is not prepared for illness or tragedy, our firm is committed to **helping you organize your information in a way that makes it manageable in a time of need.**

If you will **spend one hour with us** at the **cost of \$150.00** and **bring your basic information** (or copies of your important documents), we will help you create a **Financial Emergency Kit** that will include:

Page 1: **Your team.** Family members, emergency contact, and professionals you have worked with. A list of important documents and their location (wills, trust, DPOA, etc.).

Page 2: **A complete listing of where you have transferred risk.** What insurance companies need to be notified? What coverage do you have in place? When are premiums due to prevent coverage lapse? Those questions are answered here.

Page 3: **Your assets and obligations.** This is the most important part of the Financial Emergency Kit. If you have bills to be paid, where do the funds come from? Who has access? What about mortgage payments, do they stop because of illness or injury? Your assets are at risk! Who are your beneficiaries?

Please, for your family’s sake, make it a priority to take a few minutes and put your **Financial Emergency Kit** together. If you don’t someone else ends up doing it with out your assistance. Think of all the stress and heartache that could occur. Is that the legacy you wish to leave behind?