



TRUE ASSISTING

Organize • Protect • Simplify

Emergency Document Checklist

Be prepared for anything life brings your way

How to Use This Checklist

1. Work through each section at your own pace
2. Check off items as you locate or organize them
3. Keep both digital and physical copies when possible
4. Share the completed checklist with your trusted emergency contact

Emergency Contact

- Name:** _____ **Phone:** _____
- Relationship:** _____ **Email:** _____
- Checklist shared with contact on:** _____

IDENTIFICATION & MEMBERSHIPS

Document Type	✓	Location/Notes
Social Security cards	<input type="checkbox"/>	
Vaccine cards	<input type="checkbox"/>	
Driver's licenses	<input type="checkbox"/>	
Passports	<input type="checkbox"/>	
Birth certificates	<input type="checkbox"/>	
Military IDs	<input type="checkbox"/>	

Document Type	<input checked="" type="checkbox"/>	Location/Notes
AAA memberships	<input type="checkbox"/>	
AARP memberships	<input type="checkbox"/>	
Gym member cards	<input type="checkbox"/>	
Rewards clubs, etc.	<input type="checkbox"/>	

FINANCIAL DOCUMENTS

Document Type	<input checked="" type="checkbox"/>	Location/Notes
Bank accounts	<input type="checkbox"/>	
Credit cards	<input type="checkbox"/>	
Investment accounts	<input type="checkbox"/>	
Loans	<input type="checkbox"/>	
Other financial docs	<input type="checkbox"/>	

PROPERTY & VALUABLES

Document Type	<input checked="" type="checkbox"/>	Location/Notes
Real estate documents	<input type="checkbox"/>	
Vehicle titles/registrations	<input type="checkbox"/>	
Electronics information	<input type="checkbox"/>	
Jewelry documentation	<input type="checkbox"/>	
Artwork documentation	<input type="checkbox"/>	
Heirlooms documentation	<input type="checkbox"/>	

SECURITY & ACCESS

Document Type	✓	Location/Notes
Password managers	<input type="checkbox"/>	
Important passwords	<input type="checkbox"/>	
Garage door code	<input type="checkbox"/>	
Safe combination	<input type="checkbox"/>	
Laptop password	<input type="checkbox"/>	
Home WiFi password	<input type="checkbox"/>	
Phone password	<input type="checkbox"/>	

INSURANCE & LEGAL

Document Type	✓	Location/Notes
Life insurance	<input type="checkbox"/>	
Medical insurance	<input type="checkbox"/>	
Auto insurance	<input type="checkbox"/>	
Homeowners insurance	<input type="checkbox"/>	
Umbrella insurance	<input type="checkbox"/>	
Tax returns	<input type="checkbox"/>	
Wills/living trusts	<input type="checkbox"/>	
Power of attorney	<input type="checkbox"/>	
Medical directives	<input type="checkbox"/>	

BUSINESS & FAMILY

Document Type	✓	Location/Notes
Business documents	<input type="checkbox"/>	
Evacuation plan	<input type="checkbox"/>	
Babysitter instructions	<input type="checkbox"/>	
Emergency equipment	<input type="checkbox"/>	
Letters to loved ones	<input type="checkbox"/>	
Important contacts	<input type="checkbox"/>	

COMPLETION STATUS

Date Started: _____ **Date Completed:** _____
Documents Located: _____ / _____ **Next Review Date:** _____

TRUE ASSISTING *For more resources on financial protection and document organization, visit Trueassisting.com or [subscribe to our newsletter](#)*