YOUR FREEDOM NUMBER · FREE TEMPLATE

Checklist: Emergency Folder and Estate Planning

Chapter 14: an emergency fund and a will protect you and your family. This list helps you collect everything in one place.

Personal documents

- [ ] ID card / passport (copy)
- [ ] Birth and marriage certificates
- [ ] Tax and social security numbers (note where they are)
- [ ] Health insurance card (copy)

Money and accounts

- [ ] List of all bank and brokerage accounts (where the logins are kept – no passwords on paper)
- [ ] “Emergency fund” account: goal and current balance
- [ ] Loans and debts with contact person
- [ ] Standing orders and direct debits

Contracts and insurance

- [ ] Liability, home contents and car insurance
- [ ] Health, disability and life insurance
- [ ] Rental or purchase contract, land register extract
- [ ] Phone, internet, electricity and gas contracts

Estate planning

- [ ] Will (where it is kept)
- [ ] Power of attorney and living will
- [ ] Guardianship wishes for children
- [ ] Appointment with a notary or lawyer for advice

Important contacts

- [ ] Doctor, employer, landlord
- [ ] Tax advisor, notary, insurance agent
- [ ] Trusted person with access to this folder

The folder is kept here: _____

Last updated on: _____

This checklist is for orientation only and does not replace legal advice.