

# In case of emergency

## Do you have an “in case of emergency” file or binder?

Storing all of the important documents or items you or a loved one may need in the event of an emergency can be a life saver during an already stressful time.

As you gather this information, consider any additional information someone might need if you are incapacitated, unable to get home, or have some other type of emergency event. The checklist below is designed to help get you started but may need to be customized to your unique and individual needs.



### Checklist of Important Documents/Items

- |   |  |
|---|--|
| <input type="checkbox"/> Health Insurance Documents           | <input type="checkbox"/> Marriage License                |
| <input type="checkbox"/> Long Term Care Insurance Documents   | <input type="checkbox"/> Adoption Papers                 |
| <input type="checkbox"/> Medicare Numbers                     | <input type="checkbox"/> Life Insurance Documents        |
| <input type="checkbox"/> Doctor’s Name and Phone Number       | <input type="checkbox"/> Burial Instructions             |
| <input type="checkbox"/> Living Will                          | <input type="checkbox"/> Will/Trust documents            |
| <input type="checkbox"/> Health Care Proxy                    | <input type="checkbox"/> Retirement Plans                |
| <input type="checkbox"/> Current Medication List              | <input type="checkbox"/> Annuity Information             |
| <input type="checkbox"/> Immunization list                    | <input type="checkbox"/> List of Monthly Bills           |
| <input type="checkbox"/> Attorney’s Name and Phone Number     | <input type="checkbox"/> Bank Account Numbers            |
| <input type="checkbox"/> Copy of Photo Identification         | <input type="checkbox"/> Bank and Account Passwords      |
| <input type="checkbox"/> Do Not Resuscitate Order             | <input type="checkbox"/> Computer Passwords              |
| <input type="checkbox"/> Duplicate Set of Keys for House/Cars | <input type="checkbox"/> Tax Returns                     |
| <input type="checkbox"/> Power of Attorney                    | <input type="checkbox"/> Mortgage and Property Documents |
| <input type="checkbox"/> Social Security Numbers              | <input type="checkbox"/> Car/Boat Titles                 |
| <input type="checkbox"/> Birth Certificate                    | <input type="checkbox"/> Safety Deposit Box Keys         |

Not a bank or credit union deposit,  
obligation or guarantee

May lose value if  
surrendered early

Not FDIC/NCUA/NCUSIF insured

Not insured by any federal  
government agency

**Consult with your financial professional for a more thorough review of additional information or other documents that may need to be included in your **emergency file.****

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Information provided regarding tax or estate planning should not be considered tax or legal advice. Consult your own tax professional or attorney regarding your unique situation.

Every individual’s situation is unique. Please review your individual situation to determine a list of documents that meets your needs. This list is not meant to be inclusive of every situation.