

Collecting Home and Family Information

Life itself will ensure that you experience surprises—some welcome and some not.

This might happen to:

- You
- Someone you love
- Someone you can help

You can choose to:

- Take charge
- Stay out of it
- Join or help form a team
- Get scared and retreat

Be sure to include the following:

1. Personal information from
 - a. My personal files
 - b. Community resources
 - c. Friends and family or other important people
 - d. Spiritual guides and those I turn to for counsel
2. Housing
3. Medical information and directives
4. Other insurance
5. Financial documents and information
6. Legal documents and information
7. Next stage plans and information
8. Emergency information and plans

Notes: _____

What can I offer to do?

Name: _____

Address: _____

Home phone: _____ Work phone: _____

Cell phone: _____ Email: _____

Availability: In general, what are the best days, times and ways for you to give help?
What are your special gifts or what do you like to do that could be useful?

Carmella's story

At 10:45 a.m. Carmella's cell phone rang. Because she was at work, she looked at the number to see who was calling. Her husband. He knew she wasn't supposed to take calls now—so it must be an emergency.

And it was. A call from the fire department had told him that their house was on fire. He couldn't leave work, but he knew Carmella probably could. With kids at school, the house was empty. Could anything be saved?

Carmella ran home to find the house blocked off by emergency vehicles. Only their fireproof safe could be salvaged.

Do you have a safe place where you keep important documents?

Where is it?

What is in it?

In Carmella's safe, which was in the bedroom closet, were passports, birth and marriage certificates, and other important papers. All their possessions and photos were gone, but they were alive and had what they needed to start anew.

Inside your fireproof safe or safe deposit box:

- Passports and any other identity documents or copies
- Social security cards
- Birth/death certificates
- Marriage/divorce certificates
- Copies of important legal documents
- Information on finances/mortgages/insurances
- Passwords
- Extra keys
- Key information on health
- Extra prescriptions for life-threatening illnesses
- Other important documents or items

Special concerns about your home

Information for someone living in your house

It's good to be prepared for a time when someone else may be living in your home, such as an adult child, house sitter, elderly parent, foreign exchange student, or long-term tenant.

- Departure date/time
- Return date/time
- Dishwasher/soap
- Plants and watering
- Outdoor lights
- Bathtub/overflow/enjoy
- Who you can call in a pinch?
 - Plumber
 - Electrician
 - Landlord
 - Neighbor
- Mail/paper
- Alarm system
- TV/video
- Laundry
- Thermostat

Information on housing

Address or addresses:

Directions to where you live:

Alarm system? Company? Passwords and/or numbers?

How do you retrieve your email and phone messages?
How would your backup person retrieve them for you?

Notes:



Routine housing expenses

If you were absent for a length of time, how would routine bills be taken care of? Who would be responsible? Where would the money come from? What do they need to know?

Do you pay rent/mortgage? To whom? How much? When?

What are your regular expenses?

Utility bills _____

Insurance _____

Phone/cell phone _____

Cable/DSL _____

Loans _____

Other _____

Recognizing the need to get organized

John lives his life in two distinct communities. Between them he rents three part-time offices and two studio apartments. If he, for whatever reason, can't stay on top—he'd better get organized.

Family pets

If something happens to you, who will take care of your animals? It is good to create a list of information about your pets. Try to include:

- Names
- Birth dates
- License numbers
- Veterinarians
- Former pet sitters
- Medications
- What and when are they fed?