

THE NEIGHBORHOOD PREPAREDNESS PROGRAM



This month we're focusing on getting our documents organized. On the back is a list of suggested documents you should gather. We are recommending you store them two ways: 1) hard copies; and 2) scanned copies electronically stored in a cloud location you can reach from any device: phone, tablet or computer.

When thinking of a storage system, think about the what and where, and what you're most comfortable with. As for what, organize documents in a three-ring binder, a storage box, or an accordion style folder. When considering where, options may include a water & fire proof safe, safe deposit box at your bank, or with a trusted family member outside of your house. Digital copies should be stored in an encrypted manner if on a device like a flash drive or hard drive, or in the cloud. If you choose to use a device, make sure you place it in a secure area like a safe.

Use the checklist on the back to get your documents organized this month. If you need help making digital copies of anything, feel free to reach out!

When storing these items at home, think of where your 'grab and go' storage location will be. From Barbara: My daughter had to evacuate her apartment in San Diego County in January during that terrible fire month. I had her and her fiance on a phone conference call, coaching them on what to pack up. It made me start thinking of what are my must-have items and where would I keep them in my house!

Do you want a free Home Title check-up?

Do you need help with scanning documents? Call us for assistance!

*Scan for digital copies,
resources, & more*



davidkmercier.com/emergencyprep

FirstTeam
REAL ESTATE

Connect with us:

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PERSONAL & IDENTIFICATION DOCUMENTS
FINANCIAL & PROPERTY DOCUMENTS
MEDICAL & HEALTH DOCUMENTS
LEGAL & INSURANCE DOCUMENTS
EMERGENCY & PREPAREDNESS

| Item | Stored | Scanned | Cloud/Device |
|--|--------|---------|--------------|
| Birth Certificates | | | |
| Marriage License | | | |
| Passports/Visas | | | |
| Social Security Card | | | |
| State ID / Driver's License | | | |
| Back-up ID (student ID, military, DD214, VA, etc.) | | | |
| Naturalization/Citizenship Certificate | | | |
| Adoption Papers | | | |
| Divorce Decrees & Child Custody Agreements | | | |
| All Military and VA Records | | | |
| Home Insurance Documents | | | |
| Car Insurance Documents & Registration | | | |
| Mortgage Documents or Lease Agreements | | | |
| Property Tax Records | | | |
| Lease Agreements if renting | | | |
| Loan Agreements (Auto, Personal, Student Loans, etc.) | | | |
| Retirement Account Details (401(k), IRA, Pension, etc.) | | | |
| Investment Account Details (Stocks, Bonds, Mutual Funds, etc.) | | | |
| Credit Card Details | | | |
| Pay Stubs or Proof of Income | | | |
| Recent Statement from All Financial Accounts | | | |
| Health Insurance Documents/Medical Cards | | | |
| Medical Records (Glasses/Contact Prescriptions, History, etc.) | | | |
| Prescription List (Medications, Dosages, Doctor Info) | | | |
| Vaccination Records (Children & Pets) | | | |
| Living Will / Advance Directives | | | |
| Disability Documentation (If Applicable) | | | |
| List of Contact Info for Doctor and other healthcare providers | | | |
| Trust | | | |
| Wills | | | |
| Power of Attorney | | | |
| Titles/Deeds/etc. | | | |
| Life Insurance Policy | | | |
| Long-Term Care Insurance Policy | | | |
| Liability Insurance Policy (If Applicable) | | | |
| Employment Records | | | |
| Important Phone Numbers | | | |
| Concealed Carry License (If Applicable) | | | |
| Copies of Vehicle Registration & Title | | | |
| Safe Deposit Box Key & Details | | | |
| Printed Maps of Your Area (In Case of Tech Failure) | | | |
| Local Emergency Shelter Information | | | |
| Evacuation Plan & Emergency Contact List | | | |
| Veterinary Records (Rabies, Medical History, etc.) | | | |
| Emergency Boarding Requirements | | | |



Want to **DOWNSIZE**, but think you'll pay too much in **CAPITAL GAINS**?

We can help you crunch the numbers & **save as much as possible!**

CHILD or **GRANDCHILD** heading to **COLLEGE** soon?

We can show you how **INVESTING** in a local condo can **MAKE YOU MONEY** instead of paying room & board fees for a dormitory!

ACTION POINTS

- Make a plan to store your documents
- Gather documents
- Organize & Scan
- Like the [GoldenView MesaView Facebook Page](#). Scan to open: