



Be Prepared for Emergencies

with our

Personal and Financial Emergency Checklists!

Webb Investment Services is an Independent Registered Investment Advisor
Securities offered through Raymond James Financial Services, Inc.
Member FINRA/SIPC



PERSONAL EMERGENCY CHECKLIST

Self

Full legal name: _____ Cell phone: _____

Address: _____

Social Security #: _____ Birth date: _____

Driver's license: _____ Passport#: _____

Primary care physician name & phone# : _____

Health insurance plan name & ID #: _____

Blood type: _____ Allergies: _____

Medications & Dosages: _____

Dentist name & phone: _____

Employer: _____ Work phone: _____

HR contact name & phone: _____

Supervisor name & phone: _____

Spouse

Full legal name: _____ Cell phone: _____

Address: _____

Social Security #: _____ Birth date: _____

Driver's license: _____ Passport#: _____

Primary care physician name & phone# : _____

Health insurance plan name & ID #: _____

Blood type: _____ Allergies: _____

Medications & Dosages: _____

Dentist name & phone: _____

Employer: _____ Work phone: _____

HR contact name & phone: _____

Supervisor name & phone: _____



PERSONAL EMERGENCY CHECKLIST

Children

Name: _____ Social Security #: _____ Grade: _____

School name: _____ School phone: _____ Teacher: _____

Health insurance plan name & ID#: _____

Medications & dosage: _____ Passport #: _____

Allergies: _____ Blood type: _____

Name: _____ Social Security #: _____ Grade: _____

School name: _____ School phone: _____ Teacher: _____

Health insurance plan name & ID#: _____

Medications & dosage: _____ Passport #: _____

Allergies: _____ Blood type: _____

Name: _____ Social Security #: _____ Grade: _____

School name: _____ School phone: _____ Teacher: _____

Health insurance plan name & ID#: _____

Medications & dosage: _____ Passport #: _____

Allergies: _____ Blood type: _____

Pediatrician name & phone: _____

Address: _____

Dentist name & phone: _____

Address: _____

Specialist name & phone: _____

Address: _____

Daycare provider & phone: _____

Address: _____

Pets

Veterinarian name & phone: _____

Pet name: _____

Special considerations: _____

Pet name: _____

Special considerations: _____



FINANCIAL EMERGENCY CHECKLIST

Insurance

Protection

Insurance company name: _____

Address: _____ Phone: _____

Life insurance policy#: _____ Disability policy#: _____

Long-term care policy#: _____ Other: _____

Household

Insurance company name: _____ Agent: _____

Address: _____ Phone: _____

Homeowner policy#: _____ Auto policy #: _____

Umbrella policy#: _____ Other: _____

Financial

Financial professional name: _____ Phone: _____

Firm name & address: _____

Account 1: _____ Account 3: _____

Account 2: _____ Account 4: _____

Financial professional name: _____ Phone: _____

Firm name & address: _____

Account 1: _____ Account 3: _____

Account 2: _____ Account 4: _____

Financial professional name: _____ Phone: _____

Firm name & address: _____

Account 1: _____ Account 3: _____

Account 2: _____ Account 4: _____

Other Professionals

Attorney name: _____ Phone: _____

Firm name & address: _____

Tax professional name: _____ Phone: _____

Firm name & address: _____

Other: _____



FINANCIAL EMERGENCY CHECKLIST

Bank

Bank name: _____ Bank name: _____

Branch address: _____ Branch address: _____

Phone: _____ Phone: _____

Checking#: _____ Checking#: _____

Savings#: _____ Savings#: _____

ATM Card#: _____ ATM Card#: _____

Amt: _____ Interest rate: _____ Maturity: _____ Amt: _____ Interest rate: _____ Maturity: _____

Amt: _____ Interest rate: _____ Maturity: _____ Amt: _____ Interest rate: _____ Maturity: _____

Loans and Credit

Mortgage holder

Second mortgage holder

Home equity loan holder

Address: _____ Address: _____ Address: _____

Phone: _____ Phone: _____ Phone: _____

Account#: _____ Account#: _____ Account#: _____

Interest rate: _____ Interest rate: _____ Interest rate: _____

Car loan: _____ Car loan: _____ Car loan: _____

Holder: _____ Holder: _____ Holder: _____

Address: _____ Address: _____ Address: _____

Phone: _____ Phone: _____ Phone: _____

Account#: _____ Account#: _____ Account#: _____

Interest rate: _____ Interest rate: _____ Interest rate: _____

Credit card: _____ Credit card: _____ Credit card: _____

Billing address: _____ Billing address: _____ Billing address: _____

Phone: _____ Phone: _____ Phone: _____

Account#: _____ Account#: _____ Account#: _____

Interest rate: _____ Interest rate: _____ Interest rate: _____



EMERGENCY INFORMATION

In case of Emergency : Dial 911

Emergency numbers

Local police: _____

Local fire department: _____

Local hospital: _____

Household emergency numbers

Plumber: _____ Phone: _____

Electrician: _____ Phone: _____

Heating provider: _____ Phone: _____

Telephone company: _____ Phone: _____

Electric company: _____ Phone: _____

Cable company: _____ Phone: _____

Town hall: _____ Phone: _____

AAA/Towing: _____ Phone: _____

Other: _____ Phone: _____

Other: _____ Phone: _____

Other: _____ Phone: _____

Nearest neighbors/emergency contacts

Name: _____ Phone: _____

Name: _____ Phone: _____

Name: _____ Phone: _____

Government organizations

Social Security Administration

1-800-772-1213

www.ssa.gov

IRS

1-800-829-1040

www.irs.gov

FEMA (Federal Emergency

Management Association)

1-800-621-FEMA (3362)

www.fema.gov