



It is Time For an In Case of Emergency File and Plan



Prepare an ICE File

- Gather key items
 - Essential legal documents
 - Vital documents
 - Copies of IDs, credit cards, passports
 - Video of interiors and possessions
- Store together safely



Prepare an ICE Plan

- Bank, brokerage, and all financial accounts
- Names and contact information:
 - Lawyer
 - Banker
 - Insurance agent
 - Accountant
 - Investment advisor
- Beneficiaries
- Passwords



In Case of Emergency (ICE) Key Contacts

| | <u>Contact</u> | <u>Notes</u> |
|---|--|---|
| Lawyer | John Doe (phone number) | Will in safety deposit box |
| Accountant | Jane Smith (phone number) | Joint return |
| First National Bank Safety deposit box | Bob Anderson (phone number) | Downtown branch Keys in the office desk |
| Insurance agent Insurance carriers | Bob Jones (phone number) Insurance Company #1 Insurance Company #2 | Jones Insurance Agency Home and auto Term life and disability |
| Mortgage broker Mortgage company | Mary Johnson (phone number) First Mortgage Company | Johnson Mortgage Brokerage Documents in ICE file |



**In Case of Emergency (ICE)
Key Contacts (Cont.)**

| | Contact | Notes |
|---|--------------------------|-------------------------------|
| Wilson Financial Advisors | Ed Wilson (phone number) | Downtown location |
| Access to passwords | Anne Martin | Log-in for password service |
| Bills on auto pay: Electric Gas HOA | | Using credit card #1 |
| Online payments: Mortgage Credit card#1 Credit card #2 | | First National Bank's website |



**Sample ICE Plan
Important Account Information**

| Company | Title | Account Number | Notes | Contact Info |
|---------------------|---------------|-----------------------|--------------------|---------------------|
| First National Bank | Joint account | xxxxxx2209 | Family account | 1-800-xxx-xxxx |
| Online Brokerage | IRA Partner 1 | Xxxx6147 | Rollover IRA | 1-800-xxx-xxxx |
| | IRA Partner 2 | xxxx5534 | IRA | 1-800-xxx-xxxx |
| Firm #1 | Plan sponsor | xxxxx2345 | Partner 1 401(k) | 1-800-xxx-xxxx |
| Financial adviser | Joint account | xxxx1863 | Taxable | 1-800-xxx-xxxx |
| Mutual fund | Partner 2 | xxxxx7216 | Taxable | 1-800-xxx-xxxx |
| Credit cards | Card #1 | xxxx-xxxx-xxxx-4216 | Automatic bill pay | |
| | Card #2 | xxxx-xxxx-xxxx-8937 | All other | |