MERIT
Financial Advisors

IN CASE OF EMERGENCY (ICE) WORKSHEET

NAME: ______________________________

Wills & Trusts - Location:		
Dated		
	Name	**Contact Info**
Executor/Executrix*		
1st		
Relationship		
2nd		
Relationship		
3rd		
Relationship		
Trustees:		
1st		
Relationship		
2nd		
Relationship		
3rd		
Relationship		
Guardians for Minor Children		
1st		
Relationship		
2nd		
Relationship		
3rd		
Relationship		

NOTES: ______________________________

*Your executor will need access to articles of incorporation, buy sell agreements, key person insurance, etc.

Power of Attorney (Financial)		
Dated		
	Name	**Contact Info**
Power of Attorney/Trusted Contact		
Agent		
Relationship		
1st Alt.		
Relationship		
2nd Alt.		
Relationship		

Declaration of Guardian		
Dated		
	Name	**Contact Info**
Person		
Agent		
Relationship		
1st Alt.		
Relationship		
2nd Alt.		
Relationship		
Estate		
Agent		
Relationship		
1st Alt.		
Relationship		
2nd Alt.		
Relationship		

Power of Attorney for Health Care		
Dated		
	Name	**Contact Info**
Agent		
Agent		
Relationship		
1st Alt.		
Relationship		
2nd Alt.		
Relationship		

Directive to Physicians		
Dated		
	Name	**Contact Info**
Donor Y/N		

NOTES: ____

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Medical Insurance		
Dated		
	Name	Contact Info
Primary		
Supplement		
Rx		
Other Insurance		
Dental		
Vision		
Car/Home		
Life		
Long-term Care		

NOTES:

Other Information		
	Name	Contact Info
Preferred Hospital		
Location of Pre Paid Burial or Cremation Information		
Desired Facility for Long-Term Care		
Contact Information of		
Doctors		
Others		

NOTES:

Miscellaneous Notes & Contact Info for Professionals		
	Name	**Contact Info**
Financial Planner* and/or location of items		
CPA or Tax Professional		
Life Insurance Professional		
Estate Planning Attorney		
Business Attorneys and/or Work Contact**		
Human Resource Dept or Work Contact		
Personal and Business Bank Account Locations		

*Your Financial Plan should include your balance sheet, cash flow, titling and location of assets and liabilities, insurance, and estate plan information including beneficiaries. If you do not have a Financial Plan, all these items should be included with your ICE Document.

**Your executor will need access to articles of incorporation, buy sell agreements, key person insurance, etc.

Location of:
List of Passwords*
List of Medications
Important Documents**
Safety Deposit Box and Keys***
Storage Unit and Keys***
List of Monthly Subscriptions****

*Your list of passwords should include access to your phone and computer, as well as Credit Cards. We recommend giving your emergency contact secondary access to your phone.
**Deeds, titles, birth and marriage certificates, social security cards, passports, etc.
***We highly recommend getting a "key identifer" system as unidentified keys are a regularly mentioned painpoint for survivors.
****For example: Magazines, streaming services, gym memberships, music and gaming sites, etc. that will need to be stopped. These are often found on the Credit Cards