LOTANO FINANCIAL GROUP

OF GARDENS WEALTH MANAGEMENT

WELLS FARGO ADVISORS FINANCIAL NETWORK

Client Emergency Reference Kit

This kit contains an organized summary of your vital information in case of an emergency.

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Account Information & Liability Review

Employer Sponsored Plans

Retirement plans at your current or former employer

Plan Type	Assets	Phone Number	HR/Benefits Rep Name

Other Retirement Accounts & Pensions

IRAs, Roth IRAs, Rollover IRAs, any other individual retirement accounts, trust accounts, etc.

Account Type	Assets	Phone Number	Contact/Advisor Name

Other Non-Retirement Investment and Bank Accounts

Investment, small business accounts, college savings, 529, bank, CD, savings, checking accounts

Account Type	Assets	Phone Number	Contact/Advisor

Business Ownership Information

Business name, legal business designation, main office address and your ownership value

Business Name	Type (Corp, LLC, etc.)	Address	Ownership Value

Account Information & Liability Review

Home/Real Estate

Real estate information, type address and full property value - loan information is below

Real Estate Type	Address	Value
Primary Residence		
Secondary Residence		
Business		
Rental/Other		

Automobiles/Boat/RV

Vehicle information, make, model, year and overall value, loan information is below

Vehicle	Make & Model	Value
Auto 1		
Auto 2		
Other		
Other		

Loans/Mortages/Home Equity

loans, mortgages, home equity, personal loans, student loans, automobile, boat, RV, etc.

Loan Type	Principle Remaining	Years Remaining	Mortgage Servicing Company

Credit Cards

Card Type	Balance	Issuer	Phone

Estate Planning Information

Estate Planning Attorney

Contact information for attorney who prepared your estate planning documents - will, power of attorney, healthcare proxy, living will, etc.

Name	Phone	Email

Place an x next to the documents prepared - fill in other additional documents		
x	Document Prepared	Location
	Will	
	Power of Attorney for financial matters	
	Power of Attorney for healthcare matters	
	Trust	

Other Attorneys

Contact information for attorneys who prepared any other services for you, divorce, trust, etc.

Name	Phone	Email	Document Prepared

Protection & Insurance

Insurance Protection

Insurance policies and your representative's contact information

Insurance Type	Agent/Representative	Email	Phone Number
Home Owners			
Life			
Life			
Life			
Long Term Care			
Liability/Umbrella			
Auto			
Business			

Group/Employer Insurance Protection

Insurance you receive through your employer and your human resources or benefits coordinator's contact information

Insurance Type	HR/Benefits Representative	Email	Phone Number

Tax Planning

Tax Planning

Personal, business tax returns, quarterly filings, estate taxes, filings, etc.

Accountant/CPA	Email	Phone	Documents Prepared

Location of Past Years Tax Records

Description of location

Emergency Information

Retain for your records - do not return to your advisor

Doctors

Information for your primary care physician and any specialists

Type of Physician	Name	Location	Phone Number

Closest Relatives & Friends Not Living With you

Names and contact information for people closest to you

Name	Relationship	Email	Phone Number

Safety Deposit Box

Address, location and contact information to be able to locate and access your box(s)

Bank Name	Contact	Address

Emergency Information

Retain for your records - do not return to your advisor

Location of Cryptocurrency Application

Location

Funeral/Final Arrangements

	Name/Contact	Location	Phone Number
Place of worship			
Funeral arrangements			
Burial/Cemetary			
Other Information			

Other items to consider documenting and keeping with your important papers:

- List of all account sign-in IDs and passwords/PIN numbers
- Location and access code for home lock box and/or safe
- Inventory of any antiques, collectibles, jewelry, artwork, etc.
- Copies of drivers license and passport