

# PREPARE IN A YEAR PLAYBOOK



## PERSONAL PREPAREDNESS

### Estimated Completion Time

This presentation can be customized to fit your needs and time allowance. Ideally 30 minutes.

- 20 minutes of presentation and 10 minutes of questions
- 15 minutes of presentation and 15 minutes of questions

### OBJECTIVES

At the conclusion of this presentation the audience will be able to:

- Understand the importance of storing important documents
- Know how to store important documents
- Know what are important documents

The topics that will be discussed in this unit are:

- Storing important documents
- What are important documents

### Setting the Stage

Open up the discussion by talking about when disaster strikes, your immediate concern will be your safety and the safety of those you care about. Once the immediate danger passes, however, having your financial and medical records and important contact information will be crucial to help you start the recovery process quickly. Taking time now to safeguard these critical documents will give you peace of mind, ensure you have access to essential medical and prescription information, and help you avoid additional stress during the difficult days following a disaster.

### Prepare in a Year





### Slide 1

Insert your Agency logo on the first slide

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 <p><b>Secure Important Docs</b></p> <ul style="list-style-type: none"><li>• After a disaster you may need financial assistance.</li><li>• Having important documents may help you with this.</li><li>• The first step is to take an inventory of your household documents, contacts, and valuables.</li></ul> <p>Prepare in a Year</p>	<p>Slide 2</p> <p>Take the time to think about the priceless personal items you would want to protect from damage or take with you if you had to suddenly evacuate your home.</p> <p>The first step is to take an inventory of your household documents, contacts, and valuables.</p>
 <p><b>Secure Important Docs</b></p> <ul style="list-style-type: none"><li>• Gather property insurance papers (home, renter's, auto, boat, etc.) and make copies.</li><li>• Gather health insurance papers (medical provider, dental provider, life, extended disability, etc.) and make copies.</li><li>• Gather financial papers (bank, investment, retirement, etc.) and make copies.</li><li>• Gather wills, powers of attorney, and estate papers and make copies.</li><li>• Take photos or videos of all valuables as documentation for insurance claims.</li></ul> <p>Prepare in a Year</p>	<p>Slide 3</p> <p>Think about the documents you would need to identify yourself and your household members, including children and pets, your relationships, or status. These may include:</p> <ul style="list-style-type: none"><li>• Vital records (birth, marriage, divorce certificate, adoption, child custody papers)</li><li>• Passport, driver's license, Social Security card, green card, military service identification, other</li><li>• Pet ownership papers, identification tags</li></ul> <p>If your home or income is impacted by a disaster, you will need documentation to request assistance from insurance providers and from government disaster assistance programs.</p>

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	<ul style="list-style-type: none"><li>• Housing: lease or rental agreement, mortgage, home equity line of credit, deed</li><li>• Vehicle: loan documents, VIN, registration, title</li><li>• Other Financial Obligations: utility bills, credit cards, student loans, alimony, child support, elder care, automatic payments such as gym memberships</li><li>• Financial Accounts: checking, savings, debit cards, retirement, investment</li><li>• Insurance Policies: homeowners, renters, auto, life, flood, appraisals, photos, and lists of valuable items</li><li>• Sources of Income: pay stubs, government benefits, alimony, child support</li><li>• Tax Statements: Federal/state income tax returns, property tax, vehicle tax</li><li>• Estate Planning: will, trust, power of attorney</li></ul>
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<p><b>Secure Important Docs</b></p> <p>If you have physical copies of your important papers, store these copies and photos in a safe deposit box, fire proof box or in a zipper storage bag in your freezer.</p> <p><b>TIP:</b> Strengthen your financial preparedness for disasters and emergencies by downloading FEMA's Emergency Financial First Aid Kit at <a href="http://bit.ly/EFFAK1">http://bit.ly/EFFAK1</a></p> <p><b>Prepare</b> in a Year</p>	<p>Slide 4</p> <p>Consider storing paper copies of important documents at home in a fireproof and waterproof box or safe, in a bank safe deposit box, or with a trusted friend or relative. If you are using a safe deposit box, you may want to ask your bank or check state laws to confirm who can and cannot access the safe deposit box if the lessee dies or is incapacitated.</p> <p>Think about where you store valuable belongings and ways to better protect these items.</p> <p>If you have valuable items stored in a basement, you may want to move them to a higher location and put them in waterproof containers to avoid water damage.</p> <p>Or you may want to keep small items in a flood/fireproof home safe. You may also want to secure items that are displayed on shelves or walls if your home may be subject to high winds or earthquakes.</p>
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## PERSONAL PREPAREDNESS

The slide has a light blue background. At the top left, there is a dark blue banner with the text "Secure Important Docs" in white. To the right of the banner is a circular icon containing a document and a key. Below the banner is a bulleted list with three items. At the bottom left is the "Prepare in a Year" logo. At the bottom right is a small illustration of a storefront with a red and white striped awning.

- Store electronic copies of important documents in a password-protected format
- On a removable flash or external hard drive in your fireproof and waterproof box or safe,
- Or consider using a secure cloud-based service.

### Slide 5

Once you have gathered your financial, legal, and contact information, it is essential to safeguard this information.

Store electronic copies of important documents in a password-protected format on a removable flash or external hard drive in your fireproof and waterproof box or safe, or consider using a secure cloud-based service.

The slide has a light blue background. At the top left, there is a dark blue banner with the text "Secure Important Docs" in white. To the right of the banner is a circular icon containing a document and a key. Below the banner are two rectangular boxes with orange borders. The left box is labeled "Use the Web" and the right box is labeled "Local Resources". At the bottom left is the "Prepare in a Year" logo.

Use the Web

Local Resources

### Slide 6

Talk about your local resources as well as resources that are available on the internet.

Visit [www.us-cert.gov/ncas/tips/st04-019](http://www.us-cert.gov/ncas/tips/st04-019)

to learn how to use electronic encryption to protect sensitive information.

Download the Emergency Financial First Aid Kit (EFFAK) at [www.ready.gov/financialpreparedness](http://www.ready.gov/financialpreparedness)

for more complete checklists and guidance on collecting and safeguarding this important information.

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