

## EMERGENCY CHECKLIST

Having your retirement plans up to date is very important but preparing our loved ones for the inevitable is just as important. Herewith a valuable checklist of information to keep up to date.

### Emergency Checklist

*(Documents listed below applies to yourself and your significant other)*

- 1 Certified copy of Identity Document
- 2 Passport
- 3 Birth Certificate
- 4 Marriage Certificate
- 5 Marriage Contract
- 6 Copy/Location of Will and Contact Details of Responsible Person
- 7 Copy of Living Will & Contact Details of (Lawyer/Bank)
- 8 Car license and Certificate of Registration
- 9 Current Employer Contact Details
- 10 Salary Slip
- 11 Banking Details (Account Numbers & Pins/passwords)
- 12 Credit Card Details
- 13 Bank Loans Details
- 14 Investment Details
- 15 Stokvel Details
- 16 Life Insurance Details - Keep an up-to-date policy schedule on file
- 17 Fixed Property Title Deeds and Mortgage Details
- 18 SARS Tax Details
- 19 Utility/Rates and Water Bills
- 20 Leases or Hire Purchase Agreements
- 21 Rental Agreements
- 22 Property and Inventory Details
- 23 Provident Fund Benefit Statement
- 24 Pension Fund Benefit Statement
- 25 Retirement/Life or Living Annuity Details
- 26 Organ Donor Details
- 27 Contact Person in Case of Emergency
- 28 Club Memberships Details