

Do you have a Financial Evacuation Kit?

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For those of us blessed to live in and enjoy the Savannah and Low Country, tropical storms are an occasional reality. Even people who live far inland occasionally have weather events which force them to temporarily re-locate. Enclosed is a basic 'Financial Evacuation Kit,' which should help recreate your financial world in the event a catastrophe occurs. While not totally inclusive, it is recommended this basic information is kept in a safe place and readily available, in the event a quick exit is required.

We recommend you create and maintain the following 'Financial Evacuation Kit:

- Asset and Debt summary (valuation, balance due, interest rate, term of loan, additional payments, etc)
- Personal cash flow statement (budget), using your format – or ours (blank budget forms are available upon request)
- The most recent – and all year end (since inception) – statements on all currently held investments (brokerage, mutual funds, etc.)
- Recent statements from all savings and checking accounts
- Your most recent tax return
- Recent pension and 401 (k) statements showing current balance
- Two of the most recent pay stubs
- Benefits summary information (you can request one from human resources)
- Most recent Social Security Projections
- All life insurance and disability policies you own (outside group plans), plus any current statements (including policies you own on children or others)
- All other policies, such as homeowner, auto, 'floater,' umbrella, etc.
- Copy of your will and other pertinent estate planning documents including medical directives
- Information regarding other matters that affect the planning process, such as anticipated inheritance, pending or existing lawsuit, pre/post nuptial agreements, etc.

We also recommend you maintain a safe deposit box. For additional information, feel free to contact our office or refer to the page 16 article of January, 2008's edition of *Coastal Senior Magazine* (Click [HERE](#) to access the article *OR*** visit www.CoastalSenior.com – then click 'Archive' to access the Jan08 edition – then go to the page 16).**

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