

## Action Plan – Financial and Legal

This worksheet is designed to help readers develop financial and legal action plan using information provided in Chapter 22 (Financial and Legal) of [\*The Provident Prepper: A Common-Sense Guide to Preparing for Emergencies\*](#).

The first step is to organize all of your important documents into one place. This may be a simple task or highly complex depending on your stage of life and assets. The goal is to have all important information quickly accessible in an emergency or in the event of serious illness or death.

<b>Document Organization</b>			
<b>Originals in safe place – One copy secure at home – One copy at another location</b>			
Specific Document	Original	Home	Off-site
<b>Personal documentation</b> <i>Degrees, professional licenses, driver’s license, passport, birth certificate, marriage certificate, medical records, immunization records, concealed carry permit, social security card, military documents</i>			
<b>Insurance policies</b> <i>Life, health, property, auto, homeowners</i>			
<b>Property</b> <i>Deeds, car titles</i>			
<b>Legal</b> <i>Contracts, adoption, custody, or divorce papers, will, living trust or family trust, power of attorney, rent or lease agreement</i>			
<b>Financial</b> <i>Savings bonds, stocks and bonds, statements from investment firms, banking information, credit cards, retirement/pension</i>			
<b>Contact information</b> <i>All companies with which you do any business (banks, creditors, attorney, physician, pharmacy, etc.)</i>			
<b>Emergency contact information</b> <i>All family and friends</i>			
<b>Electronic copies</b> <i>Family photos, critical computer files, and insurance video documentation</i>			
<b>Keys</b> <i>Safety deposit box, safe, bug out location, vehicles, etc.</i>			
<b>Photos</b> <i>Recent photo of each family member and pet for identification purposes</i>			
<b>Firearms</b> <i>List of firearms, including serial numbers</i>			
<b>Passwords</b> <i>List of critical passwords or lock combinations (coded if necessary)</i>			

## Financial Action Plan

Take a moment to review your financial standing. Create an action plan to increase your financial security everyday as well as prepare for times of economic challenge.

Financial Action Plan		
Action Item	Plan	Completed
<b>Improve job skills and education</b>		
<b>Cash on hand</b>		
<b>Savings</b>		
Emergency		
Long-term		
<b>Implement budget</b>		
<b>Get out of debt</b>		
<b>Insurance Policies</b>		
Review current		
Adjust appropriately		
<b>Investment options</b>		
<b>Diversify income</b>		
<b>Charity</b>		

## Legal Action Plan

Once all of the paperwork is in order, it is a matter of simply taking time to review and update it annually. Take a moment to create your legal action plan now. You may need to visit with an attorney to ensure everything is legal and binding.

Legal Action Plan		
Action Item	Plan	Completed
<b>Create a will</b>		
<b>Name an executor</b>		
<b>Advanced directives</b>		
Living will		
Durable power of attorney for health care		
<b>Trust</b>		
<b>Video all possessions</b>		