COVID-19 CRISIS PLANNING TIPS FOR EVERYONE

Presented May 13, 2020 by:

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Tell client to establish one location where they will keep important daily information such as:

- Names and addresses of close friends and family members,
- Names and contact information for doctors, medical prescriptions and medical history,
- Work contact information,
- School contact information,
- Credit card information,
- Daily bills information,
- Bank accounts information.
Tell client to establish one location, not in a safety deposit box, where they will keep important long term documents such as:

- Passports,
- Birth certificates; marriage certificates,
- Court orders,
- Wills,
- Two years of federal and state tax returns,
- Copy of deed to home,
- Contracts such as leases /mortgage, insurance.
Tell client to:

- Have access to cash for at least a few months.
- That if monthly payments, such as rent, mortgage, car cannot be made, suggest contacting the landlord/bank and other creditors to try to work out a new arrangement. Remind them to make sure all new arrangements are in writing.
- Have extra copies of keys to the house and to the car.
- Make sure everyone in the family knows where they can access this information.