

In Case Of Emergency

By Haley Shapley

When a crisis strikes, you may need certain information fast — so be prepared.

Investing time to make sure these important documents are readily accessible will pay off. Jean A. Dorrell, a certified estate planner and founder of Senior Financial Security, Inc., recommends keeping the originals handy as well as saving a scanned copy either to your computer or a password-protected flash drive kept on your keychain.

- **A Will Or Trust.**

Store the original and give a copy to your attorney.

- **Powers Of Attorney For Both Medical And Financial Affairs.**

“These need to be current and prepared by an attorney, witnessed and notarized,” Dorrell says. “You don’t want a court-appointed guardian making your decisions. You want someone you know and trust.”

- **Financial Summaries.**

Have all your bank account numbers, plus statements for checking, savings, investment, retirement and credit card accounts.

- **Insurance Policies.**

Keep copies of any health, home, life and car insurance policies.



Jean Dorrell, CEP and founder of Senior Financial Security, (The Villages, FL.) has more than 20 years of experience working directly with seniors on a variety of financial issues. Her expertise lies within tax services, retirement and estate planning, annuity selection and wealth management.

