



When it comes to handling  
life's emergencies, we're with  
you every step of the way



**Emergency  
Checklists  
Inside**

# Are you and your family prepared in the event of an unforeseen situation?

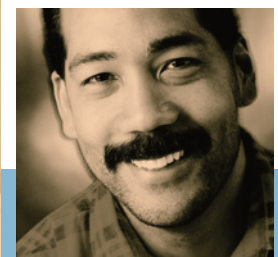
When you are in a crisis, it's hard to think calmly and clearly about the best course of action. That's why Manulife Investments along with your financial advisor urge you to take the opportunity to write down the important information you and your family may need during a time of crisis. By taking a moment now, you could save you and your family considerable stress and frustration at a time when this information is needed the most.

## **THIS BOOKLET IS DESIGNED TO ADDRESS TWO TYPES OF EMERGENCIES: PERSONAL AND FINANCIAL**

Advance preparation for personal emergencies means knowing the names and phone numbers of people to contact, medications and dosages, allergies, medical insurance coverage, daycare providers, children's teachers, veterinarians, etc. Financial emergency preparation includes knowing account information like bank accounts, investment accounts, mortgages, loans and credit cards; and also the right people to call for the situation at hand – financial advisor, insurance agent, lawyer, accountant, etc.

## **WE'RE HERE TO HELP MAKE IT EASIER FOR YOU**

In an emergency you might need to know some of this information and may not have time to think or time to waste. That's why we recommend you set aside 30 minutes to complete this brief information overview today and save yourself a few headaches at some point down the road. Make sure you keep it up to date and that it is placed where members of your family can easily access it.



# Personal Emergency Checklist

Date: .....

## SELF

Full legal name ..... Cell phone .....

Address .....

Birth date ..... SIN # .....

Driver's license # ..... Passport # .....

Provincial health plan name ..... ID # .....

Employer health plan name ..... ID # .....

Blood type ..... Allergies .....

Medications and dosages .....

.....

Primary care physician name ..... Phone .....

Dentist name ..... Phone .....

Specialist name, address ..... Phone .....

Employer name, address ..... Work phone .....

Supervisor name ..... Phone .....

## SPOUSE

Full legal name ..... Cell phone .....

Address .....

Birth date ..... SIN # .....

Driver's license # ..... Passport # .....

Provincial health plan name ..... ID # .....

Employer health plan name ..... ID # .....

Blood type ..... Allergies .....

Medications and dosages .....

.....

Primary care physician name ..... Phone .....

Dentist name ..... Phone .....

Specialist name, address ..... Phone .....

Employer name, address ..... Work phone .....

Supervisor name ..... Phone .....

## EMERGENCY CONTACT LIST

Name ..... Home phone ..... Cell phone .....

Name ..... Home phone ..... Cell phone .....

Name ..... Home phone ..... Cell phone .....

## CHILDREN

**Name** .....  
SIN # ..... Passport # .....  
School name .....  
Address ..... Phone .....  
Grade & Teacher name .....  
Provincial health plan name & ID # ..... Medications & dosages .....  
Allergies ..... Blood type .....

**Name** .....  
SIN # ..... Passport # .....  
School name .....  
Address ..... Phone .....  
Grade & Teacher name .....  
Provincial health plan name & ID # ..... Medications & dosages .....  
Allergies ..... Blood type .....

**Name** .....  
SIN # ..... Passport # .....  
School name .....  
Address ..... Phone .....  
Grade & Teacher name .....  
Provincial health plan name & ID # ..... Medications & dosages .....  
Allergies ..... Blood type .....

Daycare provider name .....  
Address ..... Phone .....  
Pediatrician name .....  
Address ..... Phone .....  
Dentist name .....  
Address ..... Phone .....  
Specialist name .....  
Address ..... Phone .....

## PETS

Veterinarian name, address ..... Phone .....  
Pet name / type .....  
Special considerations .....  
Pet name / type .....  
Special considerations .....

# Financial Emergency Checklist

Date: .....

## INSURANCE

### PERSONAL

Life Insurance policy # ..... Company ..... Phone .....  
Term insurance policy # ..... Company ..... Phone .....  
Disability policy # ..... Company ..... Phone .....  
Long-term care policy # ..... Company ..... Phone .....  
Critical illness policy # ..... Company ..... Phone .....

### HOUSEHOLD

Insurance company name .....  
Address ..... Phone .....  
Agent's name ..... Phone .....  
Homeowner policy # ..... Auto policy # ..... Other policy # .....

## FINANCIAL

Financial advisor's name ..... Phone .....  
Firm name and address .....  
Account #1 ..... Account #2 .....  
Account #3 ..... Account #4 .....

Financial advisor's name ..... Phone .....  
Firm name and address .....  
Account #1 ..... Account #2 .....  
Account #3 ..... Account #4 .....

### OTHER PROFESSIONALS

Lawyer's name ..... Phone .....  
Firm's name & address .....

Accountant's name ..... Phone .....  
Firm's name & address .....

Executor's name ..... Phone .....  
Address .....

Other .....



Manulife Investments is with you in protecting your privacy. We recommend that this page be removed from the booklet and stored in a safe place.

## BANK

Bank name, address ..... Phone .....

Chequing # ..... Savings # .....

ATM Card # ..... Certificates of Deposit .....

Amount, interest rate, maturity .....

Bank name, address ..... Phone .....

Chequing # ..... Savings # .....

ATM Card # ..... Certificates of Deposit .....

Amount, interest rate, maturity .....

## LOANS & CREDIT

Mortgage holder name .....

Address ..... Phone .....

Account # ..... Interest rate .....

Second mortgage holder name .....

Address ..... Phone .....

Account # ..... Interest rate .....

Home equity loan / line of credit holder name .....

Address ..... Phone .....

Account # ..... Interest rate .....

Car loan firm (1) name .....

Address ..... Phone .....

Account # ..... Interest rate .....

Car loan firm (2) name .....

Address ..... Phone .....

Account # ..... Interest rate .....

Credit card name .....

Billing address ..... Phone .....

Account # ..... Interest rate .....

Credit card name .....

Billing address ..... Phone .....

Account # ..... Interest rate .....

Credit card name .....

Billing address ..... Phone .....

Account # ..... Interest rate .....

# Emergency Contact Information

## IN CASE OF EMERGENCY – DIAL 911

### EMERGENCY NUMBERS

Local police .....  
Local fire department .....  
Local hospital .....

### HOUSEHOLD EMERGENCY

Plumber – name ..... Phone .....  
Electrician – name ..... Phone .....  
Heating provider – name ..... Phone .....  
Telephone company – name ..... Phone .....  
Electric company – name ..... Phone .....  
Cable company – name ..... Phone .....  
City hall – name ..... Phone .....  
Poison Information – name ..... Phone .....  
Towing – name ..... Phone .....  
Other .....  
Other .....

### NEAREST NEIGHBOURS

Name, address ..... Phone .....  
Name, address ..... Phone .....  
Name, address ..... Phone .....

## GOVERNMENT ORGANIZATIONS

#### GOVERNMENT OF CANADA

1 800 O-Canada  
(1 800 622 6232)  
TTY 1 800 926 9105  
www.canada.gc.ca

#### CANADA PENSION PLAN AND OLD AGE SECURITY

1 800 277 9914  
TTY 1 800 255 4786  
www.hrdc-drhc.gc.ca

#### DEPARTMENT OF NATIONAL DEFENCE

613 995 2534  
TTY 1 800 467 9877  
www.forces.gc.ca

#### CANADA REVENUE AGENCY (CRA)

1 800 267 6999  
TTY 1 800 665 0354  
www.cra-arc.gc.ca

#### PRIVACY COMMISSIONER OF CANADA

1 800 282 1376  
TTY 613 992 9190  
www.privcom.gc.ca

#### PASSPORT OFFICE

1 800 567 6868  
TTY 1 866 255 7655  
www.ppt.gc.ca



# Manulife Investments – With you when it comes to building and protecting your wealth

Manulife Investments is a leading provider of financial and investment solutions for Canadians. We start by trying to look at life from our customers' point of view. In close collaboration with financial advisors from across the country, we work to provide a suite of products and services that offer practical investment solutions for a wide range of financial needs.

At Manulife Investments, we take our commitment to help enhance our clients' lives seriously. A critical part of our philosophy is to apply a highly disciplined approach to managing our customers' wealth. Manulife Investments benefits from strong Canadian roots and the growing global presence of Manulife Financial.

We also understand that your financial needs will change over the years. That's why we've taken the time to build a suite of products and services ranging from wealth accumulation and protection, to generating guaranteed income for life. By offering Canadians a competitive suite of investment products and services, backed with a commitment to exceptional customer service, Manulife Investments aims to be with you every step of the way.

Manulife Investments is the brand name identifying the personal wealth management lines of business offered by Manulife Financial and its subsidiaries in Canada. As one of Canada's largest integrated financial services providers, Manulife Investments offers a variety of products and services including: segregated funds, mutual funds, annuities and guaranteed interest contracts. Manulife and the block design are registered service marks and trademarks of The Manufacturers Life Insurance Company and are used by it and its affiliates including Manulife Financial Corporation.

 **Manulife Investments**  
With you every step of the way®