






Pre-Vacation Checklist

Getting Started

The last thing you need to worry about while you're on vacation is something going wrong and not having the document or contact information you need. Allow us to help you organize some of the essential documents, accounts, and types of information you may need while on traveling.

This checklist includes the following:

-  Important Identification & Documentation
-  Important Contacts
-  Important Financial Accounts
-  Home Access & Upkeep
-  Maintenance & Troubleshooting

Remember

Everplans is the leading digital Life & Legacy Planning platform helping Financial Advisors to collaborate with their clients to organize, store, and share all of the most important details of their life. From legal and financial documents to household and digital information, Everplans keeps it all in one secure, accessible place so their family can access it when they need it most.

IDENTIFICATION / VITAL DOCUMENTS

Bring the original and / or a copy of these documents with you while traveling.

- Passport Driver's License
 Citizenship Documentation Armed Forces ID / Discharge Papers
 Other (Example: Visas, Club Memberships, State ID card):

IMPORTANT CONTACTS

- Emergency Name/Info: _____
 Emergency 2 Name/Info: _____
 Doctor Name/Info: _____
 Lawyer Name/Info: _____
 Neighbor 1 Name/Info: _____
 Neighbor 2 Name/Info: _____
 Other Name/Info: _____

CREDIT CARDS

Have a login/password for online management

- Credit Card 1 Full Digits: _____ Exp. Date: _____
 Credit Card 2 Full Digits: _____ Exp. Date: _____
 Other Financial Name/Info: _____

SECURITY & HOME ACCESS

Ensure your home sitter knows how to access the following.

- Home Security: _____ Garage Door: _____
 Wi-Fi: _____ Other: _____

Additional Instructions: _____

Learn more about Everplans at www.everplans.com.

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HOUSEHOLD EMERGENCY CONTACTS

If something goes wrong in the house, call one of these people.

- Plumber: _____ Electrician: _____
 - Gas/Electricity Company: _____ Account #: _____
 - Internet/Cable/Phone Company _____ Account #: _____
 - Exterminator: _____ Cleaning Service: _____
 - Other (Example: Management Company, Handyman, Pool Cleaner...)
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HOUSEHOLD UPKEEP

- Put Out Garbage On: **M T W Th F Sa Su** By This Time: _____
 - Get Mail On: **M T W Th F Sa Su** Place Mail: _____
 - Water Plants On: **M T W Th F Sa Su** Instructions: _____
 - Home Automation: Thermostat/Lights/Timer Instructions:
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ADDITIONAL NOTES:

Use this section for any important information, personal thoughts, or anything we may have missed.
