



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?

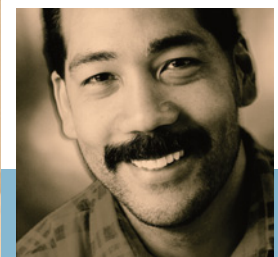
When you are in a crisis, it's hard to think calmly and clearly about the best course of action. That's why Manulife Investments along with your financial advisor urge you to take the opportunity to write down the important information you and your family may need during a time of crisis. By taking a 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®