

- Simplify life by setting up recurring payments on Navy Federal’s free Web Bill Pay—all you need is your Account Access number, ID, and password.

HEALTH CARE

- Confirm TRICARE status.
 - Ensure family members are enrolled and information is updated and accurate.
 - Provide spouse with medical cards.
- Locate and record important medical information.
 - List prescriptions, including dosages and frequencies.
 - Gather vaccination and eye prescription records.
 - Sign HIPPA release form.
 - Record names, addresses, and phone numbers of doctors, dentists, and pharmacies (see “Helpful Resources” worksheet).



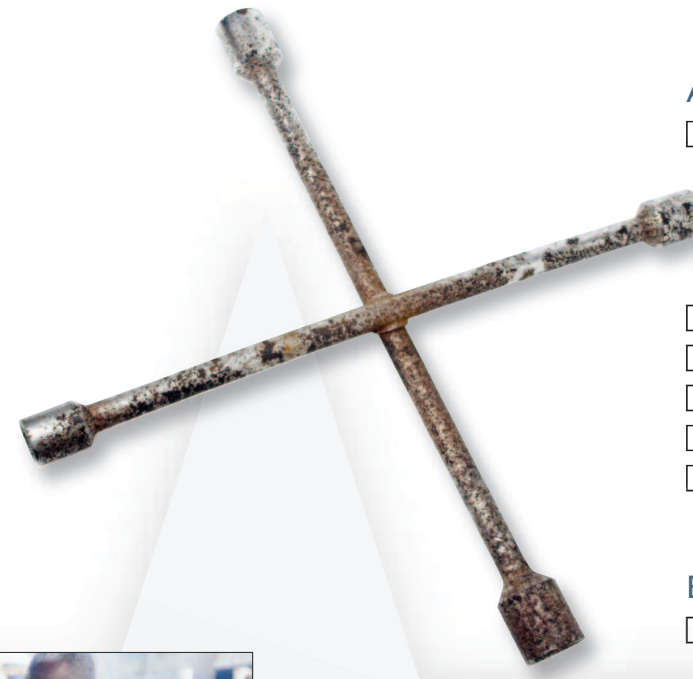
LIFE INSURANCE

- Evaluate your life insurance needs.
 - Update beneficiaries.
 - Record policy number and contact information (see “Important Account Numbers” worksheet).
 - Need life insurance? Speak with a Navy Federal Financial Group Advisor (1-877-221-8108).¹



HOME

- Review homeowners insurance policies.
 - Record company and agent names along with phone and account numbers (see “Important Account Numbers” worksheet).
 - As a member of Navy Federal, you may qualify to get special discounts from GEICO²—simply call 1-877-609-5669.
- Make and safely store spare keys for house, storage sheds, safes, etc.
- Record and safely store computer passwords (see “Important Account Numbers” worksheet).
- Ensure smoke detectors are working and install new batteries.
- Replace filters on heating and air conditioning units.
- Record contact information of trusted repair services (see “Helpful Resources” worksheet).



AUTO

- Review auto insurance policies.
 - Record company and agent names along with phone and account numbers (see “Important Account Numbers” worksheet).
 - As a member of Navy Federal, you may qualify for special discounts from GEICO³—simply call 1-877-609-5669.
- Make and safely store spare keys for all vehicles.
- Sign up for roadside assistance.
- Prepare a roadside emergency kit.
- Create a schedule for oil changes and tune-ups.
- Record contact information of trusted mechanics and dealers (see “Helpful Resources” worksheet).

EMERGENCY PREPAREDNESS

- Assemble a 72-hour emergency preparedness kit. Visit redcross.org for a comprehensive list of items to include.
- Establish and practice a home exit plan.
 - Compile an emergency contact list (see “Emergency Phone Numbers” worksheet).
 - Consider establishing an off-site friend or relative to contact should you and your servicemember be unable to reach each other.

FAMILY

- Record and safely store computer passwords (see “Important Account Numbers” worksheet).
- Notify your child’s school or daycare provider that a family member is being deployed.
- Take plenty of photos before and during the servicemember’s deployment.
- Discuss the separation, while sharing feelings and asking questions.
- Make connection points.
 - Record bedtime stories or wake-up routines to play to your children.
 - Make photo books for both the servicemember and those at home.
 - Make family videos.
 - Install video conference programs like Skype if possible.
 - Post a map of and learn about the deployment location. Consider cooking traditional meals or learning to say “hello” and “goodbye” in the native tongue.
- Scan and e-mail handmade cards or other art creations.
- Involve everyone in the letter-writing or e-mailing process.
- Create a CD or playlist that contains meaningful or memorable songs.



¹Insurance sold through licensed Insurance Representatives of various companies. Products offered through Navy Federal Brokerage Services, LLC (NFBS) and Navy Federal Asset Management, LLC (NFAM) are not NCUA/NCUSIF or otherwise federally insured, are not guaranteed or obligations of the credit union, are not offered, recommended, sanctioned, or encouraged by the Federal Government, and may involve investment risk, including possible loss of principal. Products may be offered by an employee who serves both functions of accepting member deposits and selling nondeposit investment products. Representatives registered with NFBS and NFAM (Members FINRA/SIPC). 1-877-221-8108. ²Homeowners coverage is written through non-affiliated insurance companies and is secured through the GEICO Insurance Agency, Inc. ³Some discounts, coverages, payment plans, and features are not available in all states or all GEICO companies.



Need a little help getting organized? Simply cut out these labels and use them with your hanging file folders or other organizational system.

LEGAL

- Power of Attorney
- Wills

FINANCIAL

- Account Numbers
- Credit Union or Bank Passwords
- Receipts
- Tax Records

HEALTH CARE

- Eye Care Records
- Medical Records
- Prescription Records
- Vaccination Records

HOME

- Computer Passwords
- Helpful Resources
- Home Repair Records
- Household Budget
- Important Account Numbers
- Mortgage/Renter's Agreement
- Warranties

AUTO

- Auto Care Records
- Auto Loan
- Title

INSURANCE

- Auto Insurance
- Health Insurance
- Homeowners/Renters Insurance
- Life Insurance

INVESTMENTS

- Financial Advisor
- Retirement Accounts

EMERGENCY PREPAREDNESS

- Emergency Data Card (copy)
- Emergency Phone Numbers

FAMILY

- Birth Certificates
- Driver's License (copy)
- Marriage Certificate
- Military Orders
- Passports
- Social Security Cards
- Miscellaneous

Fill in the following for special labels.

Take a few minutes to record important bank account information. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in a safe, secure location.

Navy Federal Credit Union	
Checking Account #:	_____
Savings Account #:	_____
Account Access #:	_____
User ID:	_____
Password:	_____

For questions, or to find a branch or ATM near you, visit our website at navyfederal.org, or call **888-842-6328**. Overseas, call collect at 703-255-8837.



EMERGENCY CONTACTS



Take a few minutes to record important emergency phone numbers. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in an accessible location.

Servicemember's Phone Number: _____
 Servicemember's Overseas Address: _____
 Servicemember's Emergency Contact: _____
 E-mail Address: _____
 Emergency: 9-1-1
 Police: _____
 Fire Department: _____
 Hospital: _____

Auto Insurance: _____
 Health Insurance: _____
 Homeowners Insurance: _____
 Life Insurance: _____

Doctor: _____
 Pediatrician: _____
 Optometrist: _____
 Dentist: _____

School: _____
 Daycare: _____

American Red Cross: _____
 Pastor/Chaplain/Rabbi: _____
 Base Office: _____
 Support Group: _____

Veterinarian: _____



FAMILY

Name: _____ Phone: _____
 Name: _____ Phone: _____
 Name: _____ Phone: _____

NEIGHBORS

Name: _____ Phone: _____
 Name: _____ Phone: _____

OTHER

Name: _____ Phone: _____



Take a few minutes to record a list of go-to people. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in an accessible location.

LEGAL

Lawyer: _____

FINANCIAL

Credit Union or Bank: _____

Life Insurance Agent: _____

Financial Advisor: _____



HEALTH CARE

Health Insurance Company: _____

Doctor: _____

Pediatrician: _____

Pharmacy: _____

Dentist: _____

Optometrist: _____

HOME

Homeowners Insurance Agent: _____

Home Repair: _____

Plumber: _____

Electrician: _____

Heating/Air Conditioning Repair: _____

Home Security: _____

Cable Service: _____

Phone Provider: _____

Computer Repair: _____



AUTO

Auto Insurance Agent: _____

Auto Dealer: _____

Auto Mechanic: _____



Electric/Gas

Company: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____



Water/Trash

Company: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____



Homeowners/Renters Insurance

Company: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____

Phone/Cable/Internet

Company: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____



Life Insurance

Company/Agent: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____

AUTO

Auto Loan

Company: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____

INVESTMENTS and RETIREMENT

Investments

Company/Agent: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____

IRA/Retirement

Company/Agent: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____

INSURANCE

Auto Insurance

Company/Agent: _____
 Phone Number: _____
 Account Number: _____
 User ID: _____
 Password: _____
 Due Date: _____



Should you have questions about your Navy Federal accounts or the services we offer, visit navyfederal.org, or call us at **888-842-6328** (if overseas, call collect at 703-255-8837).

HOUSEHOLD BUDGET

Month/Year: _____

	Budgeted Amount	Week 1 (actual)	Week 2 (actual)	Week 3 (actual)	Week 4 (actual)	Week 5 (actual)	Amount Spent
Income							
Net Income							
Spouse's Net Income							
Other Income							
Total Income							
Expenses							
Home							
Rent/Mortgage							
Insurance							
Other Living Expenses							
Utilities							
Electric/Gas							
Water/Trash							
Phone/Cable/Internet							
Other							
Auto							
Loan Payment							
Gas/Maintenance							
Insurance							
Other							
Insurance							
Life							
Health							
Other							

HOUSEHOLD BUDGET

	Budgeted Amount	Week 1 (actual)	Week 2 (actual)	Week 3 (actual)	Week 4 (actual)	Week 5 (actual)	Amount Spent
Expenses (continued)							
Financial Commitments							
IRA/Retirement							
Stocks/Bonds/Mutual Funds							
Savings/Money Market/Bonds							
Other							
Family							
Food							
Clothing							
Entertainment/Recreation							
School/Daycare							
Child's Activities							
Child Support/Alimony							
Tuition							
Educational Savings							
Other							
Credit Cards							
Store Credit Cards							
Star Card							
Consolidation Loan							
Personal Loan							
Student Loan							
Monthly Dues							
Miscellaneous Expenses							
Other							
Total Expenses							

