

# Checklist for Family Health Crisis Planning

Regardless of age or stage in life, every person would benefit from holding a family meeting with the objective of creating a health crisis plan for managing logistics, communication, insurance and financial management in the event of a medical emergency, at home or abroad. Here are the essential items to consider.

## #1: Medical Records

If you or a family member had a sudden health crisis, how easily could you access the medical records needed to ensure that treatment is administered quickly and seamlessly, regardless of where everyone is located? It's vital to digitize medical records and make them remotely accessible.

## #2: Insurance

Do all members of your family have global supplemental insurance not covered by traditional health insurance policies? Do you know how to get in touch with the policy administrators if need be? Again, digitizing this information will mean family members can access it remotely, if needed.

## #3: Legal Documentation

Are health proxies and powers of attorney up-to-date? Can you easily access the necessary documentation if asked for it? Has a family member or other trusted individual been designated the key point of contact for the family's advisory team in the event of an emergency, and have advisors been notified of this individual?

## #4: Business Documentation

If anyone in your family owns or operates a business, do you have a clear sense of the succession plan? Could you easily access documentation that can assist with operations?

## #5: Emergency Contact

Has a family member or other trusted individual been designated the key point of contact in the event of an emergency, and is everyone aware of who this person is and how to contact them if needed?

**In addition to making a plan, all families can benefit from access to an independent health care advocate before, during and after a health crisis. This allows for family members to focus on care and recovery rather than the complexities of today's health care system. For an aging clientele, a dedicated health care advocate eases the burden on the spouse and caregivers in the event of a difficult diagnosis or health event.**

**The Robin S. Weingast & Associates team can help  
you create a plan that will give you peace of mind and  
considers the unique needs of your family!**

**Contact us today! [rswtpa.com](http://rswtpa.com)**

