

Preliminary Emergency Readiness Assessment for Real Estate Families

Prepared by: _____ Date prepared: _____

For each item below, indicate whether the required information is current, well organized, and readily accessible to your family or advisors. Enter a "1" for NO, a "2" for PARTIALLY, or a "3" for YES.

	Information Current	Information Organized	Information Accessible
Key personal and business contacts			
Passwords and personal computer access			
Description of your hard copy and electronic filing systems			
Estate planning documents and life insurance			
Recent tax returns and supporting documentation			
List of your primary philanthropic organizations			
List of owned or leased cars, boats, and related documentation			
List of owned or leased residences and related documentation			
Schedule of all bank, securities, and retirement accounts			
Schedule of all non-real estate alternative investments and related agreements			
Schedule of all real estate investments and related operating agreements			
Database of investors and percentage interests in each managed real estate entity			
Management company organizational chart			
Description of roles and responsibilities for each senior position at the management company			
Management company leadership succession plan			
Leases and management contracts for each property			
Budgets and recent financial/operating statements for all properties			
TOTAL POINTS FOR EACH COLUMN			
GRAND TOTAL OF THE THREE COLUMNS			

If the grand total of all the columns is **greater than 125**, you are ready to write your desk plan. If your total was less than 125 you should consider contacting your planning advisor for assistance in assembling and organizing this information.