

Emergency (E-I-D) Checklist & Notes

(Also a useful reference when making planned changes like a move.)

Note that I set this up as a template for my own file, feel free to modify to fit your needs.

Who Needs to be contacted? And When?

E = External I = Incapacitation D = Death

Name & Relationship	How to contact	Type of Emergency		
		E	I	D
Jane Smith, client	email: xxx@yyy	✓	✓	✓
Albert Finney, lawyer	email: phone:		?	✓
Shamus McNeil, landlord	email: phone:			
Accountant				

Important Information

"Only you can keep your records straight." Craig Martelle at 20BooksTo50K 2023 conference

(Consider what steps you might need to take to keep login information safe)

Organization/Business/Website	Account/Username	Login (Password or other)
Bank		
Business Website	AAA-BBB	saved on computer

Ideas for freelancers

Recurring (possibly auto) payments: software, apps, etc. Keep list up to date incl. login.

- Editors Canada and other memberships
- Domain/website
- Business registration (Joint Stocks in NS)
- Dropbox
- Editing Tools/software
 - PerfectIt

- o TextExpander (or similar)
- Anti-virus/malware covered through your business
- Tax software

Business number

Business/liability Insurance

Business credit card information

Plan for “feast and famine” cycle of freelance work (e.g., do you have an emergency fund?)

Income/expense tracking, whether it be keeping the receipts in a single folder (physical or digital), tracking in an Excel file, or utilizing software such as Quick Books.

Invoice preparation

For in-house editors:

- Editors Canada
- contacts family should inform
- logins that you created
- corporate credit card

If you are also a writer:

- IP information (review author links in the resources)
 - o including translations
 - o and WIP
 - o and all other relevant information: cover design, interior design, etc.

On a personal note:

I have dividers for Housing (this includes a time line like when I had it rewired, when the new windows were installed, etc. for if he needs to sell it), Credit Cards, Insurance, Investment Accounts, Doctor's Info, Health Insurance, Utilities, My last year's taxes, Names & Addresses of friends that may need to be notified/invited etc. and my Publishing Stuff and a miscellaneous tab for little bits & pieces (where is the car title, checkbook, etc). (Author on Facebook)

The following are typically included in emergency plans:

Financial Information:

- Investment accounts (stocks, bonds, mutual funds, GICs, etc.)
- Loans & debts (mortgages, credit cards, line of credit, etc.)
- Business registration documents (articles of incorporation or partnership agreements)

- Annual filings or dissolution procedures for incorporated businesses

Business Continuity Plan:

- Professional contacts (lawyer, accountant, financial advisor, investment broker, third-party service provider)
- Subscriptions/Memberships essential for business operations
- Detailed emergency procedures for notifying clients, business partners, and third-party service providers
- Asset management procedures (for WIP items, clear protocols should be established for designated personnel who may need to access clients' confidential information.)
- Emergency communication tools (pre-drafted email templates under various scenarios)

Insurance Policies:

- Review of the terms of each policy such as life, health, home, auto, business, professional liability, cybersecurity, etc. (as some insurance coverage may require specific actions or adherence to conditions, designated personnel may need to follow specific protocols to ensure coverage remains valid)

The Table of Contents to my full Just-in-Case Binder:

Be sure to include location of originals of will and power(s) of attorney.

General Information

Categories (What does E-I-D stand for?)

What you need to know

Financial (personal)

Health

Home

Spit & Polish Editing (Nicola's business)

Who needs to be contacted

Important Information