

*Please note: This is a transcription so there may be slight grammatical errors.*

Katrina Webb:

Emergencies can be scary and stressful, and they can happen at any time. That's why it's important to have a plan.

Your emergency contact is the person who first responders will contact if you can't communicate for yourself. This role is different from a healthcare proxy or financial power of attorney. An emergency contact is a helpful resource, but unless they are a close family member, like a spouse or parent, they won't be able to make decisions on your behalf.

When choosing your emergency contact, look for someone who is reliable, trustworthy, levelheaded, and can be easily reached. The ideal candidate is someone who can talk to professionals about your medical history and current health. Once you have a candidate in mind, ask for their agreement.

Also, remember that you can choose more than one person. Make a list of who you want contacted, including their names, phone numbers, and relationship to you. Store this information in your car, phone, and wallet or purse. Just make sure you put them in order, so providers know which person to contact first.

Finally, confirm that your key contact has everything they need to be helpful when necessary, including access to your home and clear directions about where you keep important documents and medications. It's a good idea to provide them with a single document that lists your health history, primary care provider, allergies, and prescriptions. You might also consider explaining who should care for your dependents and pets if you are unable to do so.

Emergencies are hard to predict, but by planning ahead, they can be easier to manage. Need help? Call CAPTRUST. We are here to help you feel more prepared.

DISCLOSURE: CapFinancial Partners, LLC (doing business as "CAPTRUST" or "CAPTRUST Financial Advisors" is an Investment Adviser registered under the Investment Advisers Act of 1940. However, CAPTRUST presentations are designed to be educational and do not include individual investment advice. Opinions expressed in this video are subject to change without notice.

Statistics and data have come from sources believed to be reliable but are not guaranteed to be accurate or complete. This is not a solicitation to invest in any securities or participate in any investment program, and does not include any legal, medical, tax, or accounting advice. If you require such advice, you should contact the appropriate legal, medical, accounting, or tax professional.

All publication rights reserved. None of the material in this presentation may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822

© 2023 CAPTRUST Financial Advisors© 2023 CAPTRUST Financial Advisors