

John Hancock<sup>®</sup>

MUTUAL FUNDS

Advice  
for Life<sup>SM</sup>

An LPL Financial Services Program



## Be prepared for emergencies

You're never ready  
for a crisis, but you  
*can* be prepared.

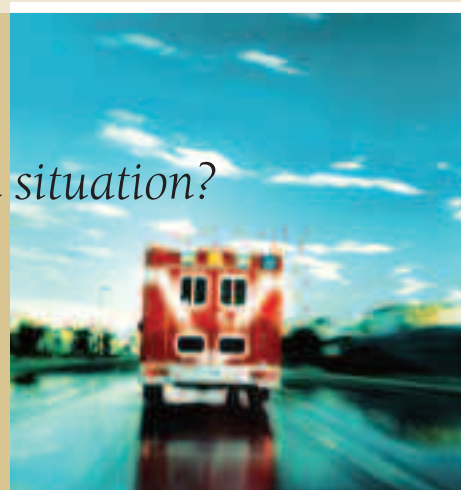
MUTUAL FUND  
EDUCATION ALLIANCE  
2006 Award Winner

Best Special  
Communication

EMERGENCY CHECKLISTS INSIDE

## Are you and your family prepared, *in the event of an unforeseen situation?*

When you're in a crisis, it's hard to think calmly and clearly about the best course of action. That's why John Hancock Funds strongly urges you to do the preparation now, when you presumably have time to think.



### There are two types of emergencies: **PERSONAL** and **FINANCIAL**

Advance preparation for personal emergencies means knowing the names and phone numbers of people to contact, medications and dosages, allergies, medical insurance coverage, daycare providers, children's teachers, veterinarian, etc. Financial emergency preparation includes knowing account information like bank accounts, investment accounts, mortgages, loans and credit cards; and also the right people to call for the situation at hand — financial adviser, insurance agent, lawyer, CPA etc.



### Make life simpler for yourself

In an emergency you might need to know some of this information — but in an emergency, you might not have time to think or time to waste. Set aside 30 minutes to complete this brief information overview today and save yourself a few headaches down the road. Make sure you keep it up to date and in an easily accessible place where you always have it at hand.

# Personal Emergency Checklist

Date: \_\_\_\_\_

## Self

Full legal name \_\_\_\_\_ Cell phone \_\_\_\_\_

Address \_\_\_\_\_

Social security # \_\_\_\_\_ Birth date \_\_\_\_\_

Driver's license # \_\_\_\_\_ Passport # \_\_\_\_\_

Primary care physician name & phone \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Blood type \_\_\_\_\_ Allergies \_\_\_\_\_

Medications and dosage \_\_\_\_\_

Dentist name & phone \_\_\_\_\_

Employer & address \_\_\_\_\_ Work phone \_\_\_\_\_

HR contact name & phone \_\_\_\_\_

Supervisor name & phone \_\_\_\_\_

## Spouse

Full legal name \_\_\_\_\_ Cell phone \_\_\_\_\_

Address \_\_\_\_\_

Social security # \_\_\_\_\_ Birth date \_\_\_\_\_

Driver's license # \_\_\_\_\_ Passport # \_\_\_\_\_

Primary care physician name & phone \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Blood type \_\_\_\_\_ Allergies \_\_\_\_\_

Medications and dosage \_\_\_\_\_

Dentist name & phone \_\_\_\_\_

Employer & address \_\_\_\_\_ Work phone \_\_\_\_\_

HR contact name & phone \_\_\_\_\_

Supervisor name & phone \_\_\_\_\_

## Emergency Contact List

Name \_\_\_\_\_ Home phone \_\_\_\_\_ Cell phone \_\_\_\_\_

Name \_\_\_\_\_ Home phone \_\_\_\_\_ Cell phone \_\_\_\_\_

Name \_\_\_\_\_ Home phone \_\_\_\_\_ Cell phone \_\_\_\_\_

# Personal Emergency Checklist

## Children

**Name** \_\_\_\_\_ Social security # \_\_\_\_\_ Grade \_\_\_\_\_

School name \_\_\_\_\_ School phone \_\_\_\_\_ Teacher \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Medications & dosage \_\_\_\_\_ Passport # \_\_\_\_\_

Allergies \_\_\_\_\_ Blood type \_\_\_\_\_

**Name** \_\_\_\_\_ Social security # \_\_\_\_\_ Grade \_\_\_\_\_

School name \_\_\_\_\_ School phone \_\_\_\_\_ Teacher \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Medications & dosage \_\_\_\_\_ Passport # \_\_\_\_\_

Allergies \_\_\_\_\_ Blood type \_\_\_\_\_

**Name** \_\_\_\_\_ Social security # \_\_\_\_\_ Grade \_\_\_\_\_

School name \_\_\_\_\_ School phone \_\_\_\_\_ Teacher \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Medications & dosage \_\_\_\_\_ Passport # \_\_\_\_\_

Allergies \_\_\_\_\_ Blood type \_\_\_\_\_

**Name** \_\_\_\_\_ Social security # \_\_\_\_\_ Grade \_\_\_\_\_

School name \_\_\_\_\_ School phone \_\_\_\_\_ Teacher \_\_\_\_\_

Health insurance plan name & ID # \_\_\_\_\_

Medications & dosage \_\_\_\_\_ Passport # \_\_\_\_\_

Allergies \_\_\_\_\_ Blood type \_\_\_\_\_

Pediatrician name & phone \_\_\_\_\_

Address \_\_\_\_\_

Dentist name & phone \_\_\_\_\_

Address \_\_\_\_\_

Specialist name & phone \_\_\_\_\_

Address \_\_\_\_\_

Daycare provider & phone \_\_\_\_\_

Address \_\_\_\_\_

## Pets

Veterinarian name & phone \_\_\_\_\_

Pet name \_\_\_\_\_

Special considerations \_\_\_\_\_

Pet name \_\_\_\_\_

Special considerations \_\_\_\_\_

# Financial *Emergency Checklist*

Date: \_\_\_\_\_

## Insurance

### Protection

Insurance company name \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Life insurance policy # \_\_\_\_\_ Disability policy # \_\_\_\_\_

Long-term care policy # \_\_\_\_\_ Other \_\_\_\_\_

### Household

Insurance company name \_\_\_\_\_ Agent \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Homeowner policy # \_\_\_\_\_ Auto policy # \_\_\_\_\_

Umbrella policy # \_\_\_\_\_ Other \_\_\_\_\_

## Financial

Financial professional name \_\_\_\_\_ Phone \_\_\_\_\_

Firm name & address \_\_\_\_\_

Account 1 \_\_\_\_\_ Account 2 \_\_\_\_\_

Account 3 \_\_\_\_\_ Account 4 \_\_\_\_\_

Financial professional name \_\_\_\_\_ Phone \_\_\_\_\_

Firm name & address \_\_\_\_\_

Account 1 \_\_\_\_\_ Account 2 \_\_\_\_\_

Account 3 \_\_\_\_\_ Account 4 \_\_\_\_\_

Financial professional name \_\_\_\_\_ Phone \_\_\_\_\_

Firm name & address \_\_\_\_\_

Account 1 \_\_\_\_\_ Account 2 \_\_\_\_\_

Account 3 \_\_\_\_\_ Account 4 \_\_\_\_\_

### Other professionals

Attorney name \_\_\_\_\_ Phone \_\_\_\_\_

Firm name & address \_\_\_\_\_

Tax professional name \_\_\_\_\_ Phone \_\_\_\_\_

Firm name & address \_\_\_\_\_

Other \_\_\_\_\_

# Financial Emergency Checklist

## Bank

Bank name _____	Bank name _____
Branch address _____	Branch address _____
Phone _____	Phone _____
Checking # _____	Checking # _____
Savings # _____	Savings # _____
ATM card # _____	ATM card # _____
Certificates of Deposit _____	Certificates of Deposit _____
Amount: _____ Interest rate: _____ Maturity: _____	Amount: _____ Interest rate: _____ Maturity: _____
Amount: _____ Interest rate: _____ Maturity: _____	Amount: _____ Interest rate: _____ Maturity: _____

## Loans and Credit

<b>Mortgage holder</b> _____	<b>Second mortgage holder</b> _____	<b>Home equity loan holder</b> _____
_____	_____	_____
Address _____	Address _____	Address _____
_____	_____	_____
Phone _____	Phone _____	Phone _____
Account # _____	Account # _____	Account # _____
Interest rate _____	Interest rate _____	Interest rate _____
<b>Car loan</b> _____	<b>Car loan</b> _____	<b>Miscellaneous loan</b> _____
Holder _____	Holder _____	Holder _____
Address _____	Address _____	Address _____
_____	_____	_____
Phone _____	Phone _____	Phone _____
Account # _____	Account # _____	Account # _____
Interest rate _____	Interest rate _____	Interest rate _____
<b>Credit card</b> _____	<b>Credit card</b> _____	<b>Credit card</b> _____
Billing address _____	Billing address _____	Billing address _____
_____	_____	_____
Phone _____	Phone _____	Phone _____
Account # _____	Account # _____	Account # _____
Interest rate _____	Interest rate _____	Interest rate _____

# Emergency Information



## IN CASE OF EMERGENCY: Dial 911

### Emergency numbers

Local police \_\_\_\_\_

Local fire department \_\_\_\_\_

Local hospital \_\_\_\_\_

Family meeting place \_\_\_\_\_

### Household emergency

Plumber \_\_\_\_\_ Phone \_\_\_\_\_

Electrician \_\_\_\_\_ Phone \_\_\_\_\_

Heating provider \_\_\_\_\_ Phone \_\_\_\_\_

Telephone company \_\_\_\_\_ Phone \_\_\_\_\_

Electric company \_\_\_\_\_ Phone \_\_\_\_\_

Cable company \_\_\_\_\_ Phone \_\_\_\_\_

Town Hall \_\_\_\_\_ Phone \_\_\_\_\_

AAA/Towing \_\_\_\_\_ Phone \_\_\_\_\_

Other \_\_\_\_\_ Phone \_\_\_\_\_

Other \_\_\_\_\_ Phone \_\_\_\_\_

### Nearest neighbors

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

### Government organizations

SOCIAL SECURITY ADMINISTRATION  
1-800-772-1213  
[www.ssa.gov](http://www.ssa.gov)

IRS  
1-800-829-1040  
[www.irs.gov](http://www.irs.gov)

FEMA (Federal Emergency  
Management Association)  
1-800-621-FEMA (3362)  
[www.fema.gov](http://www.fema.gov)

# Why John Hancock Funds?

*For more than three decades, John Hancock Funds has been helping individual, corporate and institutional clients reach their most important financial goals. With so many fund companies to choose from, why should you invest with us?*

## **A NAME YOU KNOW AND TRUST**

When you invest with John Hancock Funds, you are investing with one of the most recognized and respected names in the financial services industry. Our parent company has been helping individuals and institutions increase and protect wealth since 1862.

## **SOLUTIONS ACROSS THE INVESTING SPECTRUM**

We offer equity, income, international and sector investment solutions managed by in-house and external investment managers. Each of our funds utilizes a disciplined, team approach to portfolio management and research, leveraging the expertise of seasoned investment professionals.

## **COMMITTED TO YOU**

Our shareholders come first. We work hard to provide you with the products you need to build a solid financial foundation. We believe in the value of advice and partner with financial professionals in a commitment to help you reach your long-term investing goals.

**For information about any John Hancock fund, please read the prospectus. The prospectus contains more complete information about factors that should be considered before investing, including investment objective, charges, expenses and risks. Please read the prospectus carefully before investing or sending money.**

**For prospectuses, call your financial professional or John Hancock Funds at 1-800-225-5291, or visit our Web site at [www.jhfunds.com](http://www.jhfunds.com).**



- John Hancock Signature Services, Inc. (JHSS) is the transfer and shareholder services agent for John Hancock Funds. JHSS was awarded “**Best-In-Class**” honors and “**5-Star**” performer status for telephone customer service for all of 2006 from the National Quality Review.
- John Hancock Funds won many awards, including “**Best Overall Communications**” from the Mutual Fund Education Alliance in 2006.
- The John Hancock Funds Web site won “**Outstanding Web Site**” from the Web Marketing Association, and was awarded the W<sup>3</sup> Silver Award for “**Creative Excellence on the Web.**”

*John Hancock*  
the future is yours

### **John Hancock Funds, LLC**

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