



Disaster Recovery Plans

Lists to maintain:

- Notice "Tree" if office relocates
 - Employees (home phone, address, cell number, other email address)
In HARD COPY
 - Clients (be sure to include email address) in hard copy
 - Vendors (name, contact person, phone, email, ACCOUNT NUMBERS)
In hard copy
 - Regulators (if expect to relocate for more than 10 days)

- Password list (including bank PIN numbers)
- Insurance Policy Numbers, Dates, contact info
- Financial resources
 - Credit card numbers, expiration dates, ATM PINs,
- Equipment and software inventory

Mission Critical Material to take from Office in an emergency

- Checkbook
- Extra keys
- Current Disaster Plan

Create an emergency backpack for the office:

Flashlights, space blankets, water, granola bars, whistles, keep a stash of cash available

Material to keep offsite in a Fireproof File:

- Hard copies of password, client and vendor lists
- CD ROM of scanned client documents (executed subscription documents)
And other critical signed agreements
- CD ROM of Insurance Policies
- List of financial resources, including extra set of credit cards
- Hard copy written procedures to initiate data restoration
- Hard copy of equipment and software inventory

Determine alternate location in same city (usually all will work from homes)

Determine alternate location in another city—have a sharing agreement with a colleague

Calendar:

- Monthly:* Update client list
- Quarterly:* Update password list, equipment inventory
- Annually:* Test the program. Close the office unexpectedly and see what fails
 - Update insurance info on CD
 - Review financial resources and determine if are adequate