

My family preparation binder

Write only what you want to share. Keep the binder in a place you choose.

NAME

DATE

The people I chose

Never write passwords or account numbers here.

FIRST PERSON AND CONTACT ROUTE

ANOTHER PERSON AND CONTACT ROUTE

WHO KNOWS WHERE THIS BINDER IS

A BACKUP CONTACT

Where my papers are

Never write passwords or account numbers here.

WILL OR OTHER LEGAL PAPERS

HEALTH CARE PAPERS

TAX AND ACCOUNT PAPERS

ORIGINALS AND COPIES

WHO KNOWS THESE LOCATIONS

My doctors and medicines

Names only. Use the current medicine list for details. This sheet gives no medical instructions.

DOCTORS' NAMES

MEDICINE NAMES

WHERE THE CURRENT LIST IS KEPT

WHO CAN PROVIDE THE CURRENT LIST

My accounts

Never write account numbers or passwords here. Institution names and account types only.

INSTITUTION AND ACCOUNT TYPE

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INSTITUTION AND ACCOUNT TYPE

My phone and online accounts

Write the setting name or where its instructions are kept. No passcodes, passwords, keys or recovery codes.

PHONE CARRIER AND WHERE ITS PAPERWORK IS KEPT

APPLE LEGACY CONTACT SETTING REVIEWED

GOOGLE INACTIVE ACCOUNT MANAGER REVIEWED

OTHER OFFICIAL SETTINGS REVIEWED

PASSWORD MANAGER PREPARATION ROUTE

Bills and autopay

Never write passwords or account numbers here.

BILLS THAT NEED ATTENTION

WHICH BILLS USE AUTOPAY

WHERE THE BILL LIST IS KEPT

WHO TO CONTACT ABOUT A QUESTION

Home and keys

Never write passwords or account numbers here.

WHO HAS A KEY

WHERE HOUSEHOLD INSTRUCTIONS ARE KEPT

WHO TO CALL ABOUT THE HOME

SOMETHING IMPORTANT ABOUT THE HOUSE

My pets

Never write passwords or account numbers here.

WHO TO CALL ABOUT MY PETS

VET AND CONTACT ROUTE

WHERE FOOD AND CARE INSTRUCTIONS ARE KEPT

WHERE THE PET PLAN IS KEPT

My wishes

Never write passwords or account numbers here.

WHAT MATTERS MOST TO ME

WHERE MY WRITTEN CARE WISHES ARE KEPT

WHERE MY PERSONAL LETTER IS KEPT

SOMETHING I WANT MY FAMILY TO KNOW

Who to call first

Never write passwords or account numbers here.

THE FIRST PERSON AND CONTACT ROUTE

ANOTHER PERSON TO CALL

THE PROFESSIONAL WHO KNOWS MY PLAN

WHERE THE FULL CONTACT LIST IS KEPT

Notes

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SOMETHING TO EXPLAIN

A QUESTION TO ASK

ANOTHER NOTE

WHEN I WANT TO REVIEW THIS AGAIN
