

Start here

A small starting point for someone you trust. Complete only what fits your household. Keep this pack protected, share appropriate pages and keep passwords, access keys and full account numbers elsewhere.

Prepared by / date checked

Where the fuller document index and protected instructions live

First contact: name, role and contact method

Backup contact: name, role and contact method

Other essential contact / service: name, role and contact method

What needs attention first if I am unavailable?

Use the local emergency number for immediate danger. Follow official instructions; do not delay care or evacuation to complete paperwork.

Important documents checklist

Use this as a search list, not a requirement to create every document. Write a location, a follow-up or N/A. Keep originals and copies distinct in the index on page 3.

Record category	Location / follow-up / N/A
Identity and family certificates	
Marriage, adoption or divorce records	
Existing will and trust records	
Existing powers of attorney	
Existing health-planning documents	
Insurance policies and provider contacts	
Bank and investment institution records	
Current beneficiary records	
Housing / property / vehicle records	
Loans, recurring bills and subscriptions	
Employment and benefit contacts	
Current care information location	
Digital accounts and approved access plan	
Home inventory and receipt references	
Pet records and care instructions	

Questions about validity, required originals or retention belong with the relevant professional or institution. This checklist does not create legal authority. Sources and scope: page 8.

Document location index

Record directions another person can follow. Keep the record itself and any access secret in appropriate protected storage. Copy this page for additional records.

Record 1: name / category

Original location / copy location

Custodian or help contact / last checked

Record 2: name / category

Original location / copy location

Custodian or help contact / last checked

Record 3: name / category

Original location / copy location

Custodian or help contact / last checked

Household account map

Start with essential bills, insurance and digital services. Use provider names and record locations, not full identifiers, passwords or recovery codes. An inventory grants no permission to transact.

Service 1: provider / purpose

Statement location / next due date or renewal to verify

Verified contact route / approved access-process location

Service 2: provider / purpose

Statement location / next due date or renewal to verify

Verified contact route / approved access-process location

Service 3: provider / purpose

Statement location / next due date or renewal to verify

Verified contact route / approved access-process location

Personal letter of last instruction

Use these prompts for an informal family note. This page is not a will, beneficiary designation, power of attorney, medical directive or bank instruction. Resolve conflicts with formal documents through qualified advice.

For / from / date

Please begin here: contact person and document-index location

Household responsibilities that need attention

Personal wishes or context I want discussed

Questions for my professional adviser / next review

Temporary household handoff

Agree on the scope with the people involved. Point to current care-team instructions rather than rewriting treatment directions. A household note does not replace required school, care-provider or account authorizations.

Handoff period / usual contact / what if the return is delayed?

Task 1: responsibility and timing

Agreed person / backup / current-instruction location

Task 2: responsibility and timing

Agreed person / backup / current-instruction location

Task 3: responsibility and timing

Agreed person / backup / current-instruction location

When the usual person returns, confirm who has responsibility and resolve the outstanding questions. Share only the details each helper needs.

Try the handoff, then review

A practical rehearsal designed by WiseTomorrow. This is an organizing exercise, not a validated readiness assessment. Do not reveal secrets or test an actual emergency account takeover.

- 1. Ask your chosen person to find the first contact, one record location and one routine responsibility without your help.
- 2. Note where the directions worked and where they failed. Time the search only if useful to you; there is no passing score.
- 3. Fix one unclear instruction, try again and tell affected helpers which copy is current.

What could the helper find? What was unclear?

Change to make / person responsible / follow-up date

Where current copies live / who received a replacement

Next review date or trigger (move, new contact, account or care change)

Sources and scope

Prepared by WiseTomorrow, the maker of Wise Box. These original worksheets support information organization; they are not an independent product review. AI assisted drafting and implementation. No specialist review is claimed.

Using the pack

Print the pages you need and fill them in by hand. The website also offers editable worksheets that keep entries only in browser memory. Save your copy in protected storage. Review after relevant household changes and before relying on an old instruction.

National Institute on Aging: Getting your affairs in order

<https://www.nia.nih.gov/health/advance-care-planning/getting-your-affairs-order-checklist-documents-prepare-future>

CFPB: Prepare before a disaster or emergency

<https://www.consumerfinance.gov/consumer-tools/disasters-and-emergencies/get-prepared-before-disaster-emergency-strikes/>

FTC: Organize important papers before a disaster

<https://consumer.ftc.gov/articles/how-organize-your-important-papers-disaster-strikes>

AHRQ: Hospital-to-home care transitions

<https://www.ahrq.gov/patient-safety/patients-families/engagingfamilies/strategy4/index.html>

Source guidance checked September 9, 2026. Sources support the organizing principles; the worksheets and rehearsal are WiseTomorrow designs, not official agency forms or agency endorsements.

More help

wisetomorrow.com/guides/emergency-binder

wisetomorrow.com/guides/important-documents-checklist

wisetomorrow.com/guides/letter-of-instruction

wisetomorrow.com/tools

Corrections: support@wisetomorrow.com. Use the institution or a qualified legal, financial or care professional for decisions specific to your circumstances.