Start Here

Everything your family will need, on paper, in one place.

These pages go with the book. Print them, fill them in by hand, and keep them together in one folder — the folder from Chapter 3. They aren't fillable PDFs on purpose: your passwords and account numbers belong on paper in your home, not stored online.

Print as many copies of any page as you need. Start with whichever one feels easiest. You won't finish in one sitting, and you don't have to.

What's inside

Open This First	For whoever needs it first
Password & Account Log	Chapter 1
Medication List & Wallet Cards	Chapter 1
Medical Summary	Chapters 1 & 3
The Money Map	Chapter 2
The Papers: Document Locator	Chapter 3
The Stuff: This Goes To...	Chapter 4
The Story: Family Medical History	Chapter 5
The Preferences	Chapter 6
The Permission: In My Own Words	Chapter 7
The Words: "I want you to know..."	Chapter 8
The Annual Review	Chapter 9
The Master Checklist	Every chapter

Your two dates

MY DEADLINE — I'LL FINISH THIS BOOK BY

MY REMINDER DAY — I'LL REVIEW IT EVERY YEAR ON

Open This First

The first page anyone should read. Keep it on top of the folder.

If you're reading this, something has happened. Take a breath. You don't have to do everything today. Start here, then open the folder.

MY FOLDER IS KEPT

MY PASSWORD LOG IS KEPT

MY PHONE PASSCODE IS KEPT

SPARE KEYS ARE KEPT

Call these people first

WHO	NAME	PHONE	NOTES
Executor			
Healthcare decision-maker			
Spouse / partner			
Adult child			
Attorney			
Financial advisor / accountant			

If I am on hospice care

CALL HOSPICE FIRST — NOT 911. HOSPICE PHONE

PATIENT ID / NOTES

PETS AND WHO WILL TAKE THEM

PEOPLE I CARE FOR OR CHECK ON

Anything else you need to know right away

Password & Account Log

List them alphabetically by website, like a phone book. Print more pages as you need them.

DID YOU REMEMBER…

- [ ] Phone
- [ ] Email
- [ ] Bank accounts
- [ ] Investments
- [ ] Insurance
- [ ] Bills
- [ ] Medical records
- [ ] Social media
- [ ] Government
- [ ] Work

Underline every capital letter. Passwords are case-sensitive. My dad wrote everything in capitals, and we had to guess which letters really were. Example: MapleStreet42

WEBSITE OR INSTITUTION	USERNAME / EMAIL	PASSWORD	SECURITY QUESTIONS · 2-FACTOR	NOTES

Medication List

Prescription and over-the-counter. If you end up in an ER, this list speaks for you.

MEDICATION	DOSE	HOW OFTEN	WHAT IT'S FOR	PRESCRIBED BY

Include the ones you don't think of as medications: sleep aids, melatonin, magnesium, daily Tylenol, fish oil, vitamin D, inhalers, creams. And take a photo of every bottle — keep them in a phone folder called "Medications."

MY MEDICATIONS — cut out · keep in wallet

NAME _____ DATE OF BIRTH _____

ALLERGIES _____

MEDICATIONS · DOSE · HOW OFTEN _____

EMERGENCY CONTACT _____ PHONE _____

MY MEDICATIONS — cut out · keep in wallet

NAME _____ DATE OF BIRTH _____

ALLERGIES _____

MEDICATIONS · DOSE · HOW OFTEN _____

EMERGENCY CONTACT _____ PHONE _____

Medical Summary

Your health on one page — for the ER, a new doctor, or the person speaking for you.

NAME

DATE OF BIRTH

BLOOD TYPE

CONDITIONS AND DIAGNOSES

ALLERGIES (DRUGS, FOODS, OTHER)

IMPLANTS, DEVICES, PACEMAKER

SURGERIES AND HOSPITALIZATIONS (WHAT AND WHEN)

My doctors

DOCTOR	NAME	PHONE	PATIENT PORTAL / LOGIN KEPT
Primary care			
Specialist			
Specialist			
Dentist			
Eye doctor			
Other			

Pharmacy and insurance

PHARMACY AND PHONE

HEALTH INSURANCE AND MEMBER ID

MEDICARE / SUPPLEMENT / PART D

ADVANCE DIRECTIVE & HEALTHCARE POA ARE KEPT

The Money Map

Page 1 of 2 — what you have, and where it is.

One line per account. Use the last four digits only — never the full number. Over the next few weeks, watch your email and statements for accounts you forgot.

Bank accounts INSTITUTION / COMPANY	ACCOUNT TYPE	LAST 4	HOW TO ACCESS	PHONE

Investment & retirement INSTITUTION / COMPANY	TYPE (401K, IRA…)	LAST 4	BENEFICIARY	PHONE

Life insurance INSTITUTION / COMPANY	POLICY #	AMOUNT	BENEFICIARY	AGENT · PHONE

Other insurance INSTITUTION / COMPANY	TYPE (HOME, AUTO…)	POLICY #	RENEWS	PHONE

The Money Map, continued

Page 2 of 2 — what you owe, what renews, and who to call.

Debts INSTITUTION / COMPANY	TYPE (MORTGAGE, CARD…)	LAST 4	MONTHLY PAYMENT	PHONE

Recurring charges INSTITUTION / COMPANY	WHAT IT IS	AMOUNT	PAID FROM	HOW TO CANCEL

Social Security & pensions SOURCE	CLAIM / ID #	MONTHLY AMOUNT	DEPOSITED TO	PHONE

Tax information FEDERAL & STATE	WHERE RETURNS ARE KEPT	LAST YEAR FILED	PREPARED BY	PHONE

The professionals ROLE	NAME	FIRM	PHONE	EMAIL
Accountant				
Financial advisor				
Attorney				
Insurance agent				

BENEFICIARIES LAST CHECKED ON

I WALKED THIS MAP THROUGH WITH

Document Locator

One folder. Clearly labeled. In a known location.

Papers that protect you while you're alive

DOCUMENT	HAVE IT	NEED IT	WHERE IT IS	LAST UPDATED
Power of attorney — financial	☐	☐		
Power of attorney — healthcare	☐	☐		
Advance directive / living will	☐	☐		
MOLST or POLST	☐	☐		

Papers that protect your family after you're gone

DOCUMENT	HAVE IT	NEED IT	WHERE IT IS	LAST UPDATED
Will	☐	☐		
Life insurance policies	☐	☐		
Property deed	☐	☐		
Car titles	☐	☐		
Marriage certificate	☐	☐		
Birth certificate	☐	☐		
DD-214 (if you served)	☐	☐		
Tax returns (last 3 years)	☐	☐		
Social Security card	☐	☐		

If anything is more than five years old — update it. Keep originals of your will, powers of attorney and advance directive **outside** the safe deposit box.

EVERYTHING IS IN ONE FOLDER, KEPT

I TOLD

This Goes To...

Would your family know what to do with it? If yes, label it. If no, let it go.

ITEM _____ GOES TO _____

THE STORY BEHIND IT

ITEM _____ GOES TO _____

THE STORY BEHIND IT

ITEM _____ GOES TO _____

THE STORY BEHIND IT

ITEM _____ GOES TO _____

THE STORY BEHIND IT

ITEM _____ GOES TO _____

THE STORY BEHIND IT

ITEM _____ GOES TO _____

THE STORY BEHIND IT

One room at a time

- ☐ _____ date _____
- ☐ _____ date _____
- ☐ _____ date _____
- ☐ _____ date _____
- ☐ _____ date _____
- ☐ _____ date _____

STORAGE UNIT — WHERE, UNIT #, KEY KEPT

DIGITAL STUFF — PHOTOS, FILES, WHERE THEY LIVE

The Story

The history only you carry — including the medical story your family needs.

Family medical history

RELATIVE	CONDITION(S)	AGE AT DIAGNOSIS	WHAT HAPPENED · WHAT HELPED
Mother			
Father			
Sibling			
Sibling			
Mother's mother			
Mother's father			
Father's mother			
Father's father			
Aunt / uncle			
Child			

The gene tells the risk. The story tells what to do about it. Write down what saved someone — the early screening, the lump that wasn't ignored.

Five minutes today

- [ ] I recorded one story — about _____
- [ ] I labeled five photos — they're kept _____
- [ ] I cooked this recipe with the person who knows it _____
- [ ] Words only our family uses _____

The Preferences

Stated preferences end arguments before they start.

MY THREE MOST IMPORTANT PREFERENCES

MY BODY

- ☐ Burial
- ☐ Cremation
- ☐ Green burial
- ☐ Aquamation
- ☐ Natural organic reduction
- ☐ Not sure yet

THE SERVICE — WHAT KIND, WHERE

WHO SPEAKS

THE MUSIC

A READING OR WORDS I WANT SHARED

OPEN CASKET

☐ Yes ☐ No ☐ Family decides

ORGAN DONATION

☐ Yes ☐ No ☐ Registered

WHAT TO WEAR

IN LIEU OF FLOWERS

THE OBITUARY — INCLUDE / LEAVE OUT

PERSONAL ITEMS TO KEEP WITH ME

THE PET — WHO TAKES THEM

ANYTHING ELSE

I TOLD THESE THREE THINGS TO

ON (DATE)

In My Own Words

Say it out loud. Then write it here, so they can hear your voice later.

THE PERSON MAKING DECISIONS FOR ME

PHONE

Let me go

"If I get to a point where I'm suffering and there's no meaningful recovery ahead, I want you to let me go. Choose comfort over continuation. Don't keep me alive for you — let me go for me."

Don't feel guilty

"When this is over, don't spend your time wondering if you did the right thing. You did. Whatever you decided, you did it because you loved me, and that's enough."

In my own words

SIGNED

I SAID THIS OUT LOUD TO

DATE

This isn't a legal document. Your advance directive and healthcare power of attorney (Chapter 3) are. This page is your voice — for the people who will carry out those decisions.

A Letter

A letter is for when you can't be there. Start here.

TO

I want you to know...

WITH LOVE

DATE

ENVELOPE LABEL · FOR

TO BE OPENED

The Annual Review

The plan you built is accurate today. This keeps it accurate next year.

REVIEW DATE _____ MY REMINDER DAY _____ NEXT REVIEW _____

Thirty minutes, once a year

- [ ] New accounts or closed accounts added to the money map
- [ ] Passwords updated — capitals underlined
- [ ] Medications and doctors still current
- [ ] Documents more than five years old updated
- [ ] Beneficiaries still correct
- [ ] Preferences still what I want
- [ ] “Let me go” said again to my decision-maker
- [ ] New items added to “This goes to…”
- [ ] A new story recorded or photos labeled
- [ ] My folder is where my person thinks it is

What changed this year

REVIEWED BY _____ I TOLD _____

The Master Checklist

Every "Do this now" in the book, in one place.

date done →

1 · The Passwords

- [ ] List every account — site, username, password, security questions _____
- [ ] Underline every capital letter _____
- [ ] Photograph every medication bottle _____
- [ ] Make a wallet medication list _____
- [ ] Tell one person where the log is _____

2 · The Money Map

- [ ] List what you have and where it is _____
- [ ] Check statements for forgotten recurring charges _____
- [ ] Walk someone through the page _____

3 · The Papers

- [ ] Gather every document into one folder _____
- [ ] List what's missing — and get it _____
- [ ] Update anything older than five years _____
- [ ] Tell someone where the folder is _____

4 · The Stuff

- [ ] Pick one room and set a date _____
- [ ] Label what matters _____
- [ ] Give things away while you can say why _____

5 · The Story

- [ ] Record one story _____
- [ ] Label five photos _____
- [ ] Write one paragraph of family medical history _____
- [ ] Cook one recipe with the person who knows it _____

6 · The Preferences

- [ ] Tell one person three preferences — tonight _____
- [ ] Write the rest down and put it in the folder _____

7 · The Permission

- [ ] Say "let me go" to your decision-maker _____
- [ ] Tell them not to feel guilty _____
- [ ] Say it again next year _____

8 · The Words

- [ ] Have one conversation you've been postponing — or write one letter _____

9 · The System

- [ ] Pick your reminder day and your deadline _____
- [ ] Do your annual review _____

The to-do list is done.
Go do everything else.