



A FREE FAMILY PREPAREDNESS TOOL

What My Family Needs to *Know*

Everything your loved ones would need to find — in one place —
so they're never left searching during a hard time.

PREPARED BY

DATE

ACOMPLIMENTARY COMMUNITY SERVICE

Provided by Dr. Fred Rouse • The REAL Money Doctor • DrFredRouse.com

Before you begin

If something happened to you tomorrow, would the people you love know where to look? Most families don't — not because they don't care, but because no one ever wrote it all down in one place.

This is that place.

HOW TO USE THIS ORGANIZER

Fill in what you can, in any order. It's completely fine to leave blanks — you can always come back. Most people work through it a little at a time over a week or two. The goal isn't to finish in one sitting; it's to get the important things out of your head and onto paper.

WHAT'S INSIDE — CHECK OFF AS YOU GO

- | | |
|---|---|
|  1 About me |  2 My trusted team |
|  3 Important documents & where to find them |  4 Financial accounts at a glance |
|  5 Insurance & benefits |  6 Home, property & monthly obligations |
|  7 My digital life |  8 Healthcare & my wishes |
|  9 Final wishes | |

★ As you go, put a star next to anything you're unsure about or would like a second set of eyes on. By the end you'll have a ready-made list — and a complimentary review waiting at the back if it's ever helpful. No pressure, no obligation.

When you're done, do two things: keep this organizer somewhere safe (a fireproof box or with your other important papers), and tell **one trusted person** where to find it. An organizer no one can find can't help anyone.

A note on security. This binder will contain sensitive details. Avoid writing full account numbers, Social Security numbers, or passwords on these pages unless the binder is kept in a locked or secure place. Where a page says "where it's kept," you can simply point to where the full information lives.

This organizer is a tool for gathering and organizing your own information. It is not legal, financial, tax, or medical advice, and it is not a will, trust, or advance directive. For guidance on any of those, please consult a qualified professional.

1 About me

FULL LEGAL NAME

ALSO KNOWN AS / NICKNAME

DATE OF BIRTH

PLACE OF BIRTH

PHONE

HOME ADDRESS

EMAIL

WHERE MY SOCIAL SECURITY CARD IS KEPT

THE PEOPLE CLOSEST TO ME

NAME	RELATIONSHIP	PHONE	LIVES IN / CITY

IF SOMETHING HAPPENS, CONTACT FIRST

NAME	RELATIONSHIP	PHONE	NOTES (E.G., HAS A KEY, IS MY EXECUTOR)

2 My trusted team

The professionals who help with my affairs. Your family will be glad to have these names and numbers in one place.

ROLE	NAME	FIRM / COMPANY	PHONE OR EMAIL

Common roles to list: attorney, financial advisor, accountant / CPA, insurance agent, banker, doctor(s), and anyone else your family may need to reach.

3 Important documents & where to find them

You don't need to write what the documents say — just whether you have one and where it lives.

HAVE IT? (Y/N)

DOCUMENT		WHERE IT IS KEPT	WHO TO CONTACT

Helpful list to walk through: Will · Living trust · Power of attorney (financial) · Healthcare directive / living will · Birth & marriage certificates · Property deeds · Vehicle titles · Safe deposit box (and where the key is) · Military / veteran records.

4 Financial accounts at a glance

A simple map of where things are—so nothing valuable is ever lost or forgotten.

For your security: list the institution and type, not full account numbers. Note where the full details are kept instead.

INSTITUTION	TYPE (CHECKING, IRA, 401(K), BROKERAGE...)	WHERE FULL DETAILS ARE KEPT	BENEFICIARY ON FILE?

5 Insurance & benefits

INSURANCE POLICIES

TYPE	COMPANY	POLICY #	AGENT / CONTACT	BENEFICIARY

Types to consider: life, health, long-term care, home, auto, disability, umbrella.

PENSIONS, ANNUITIES & BENEFITS

SOURCE	TYPE	CONTACT / WHERE DETAILS ARE KEPT

6 Home, property & monthly obligations

HOME & PROPERTY

MORTGAGE LENDER/LOAN SERVICER

WHERE THE DEED / TITLE IS KEPT

OTHER PROPERTY (VACATION HOME, LAND, STORAGE)

RECURRING BILLS & SUBSCRIPTIONS

Things your family may need to continue, cancel, or know about.

WHAT IT IS	COMPANY	HOW IT IS PAID (AUTO-PAY, CHECK...)

7 My digital life

More of life lives online than ever. This helps your family reach what matters — and close what doesn't.

Never write passwords here. Instead, note **where** they can be found (a password manager, a sealed envelope, a trusted person).

PRIMARY EMAIL ACCOUNT

PHONE PASSCODE IS KEPT (WHERE / WITH WHOM)

PASSWORD MANAGER (WHICH ONE & HOW TO ACCESS)

KEY ONLINE ACCOUNTS

ACCOUNT / SERVICE	USERNAME OR EMAIL	WHAT I WOULD WANT DONE WITH IT

8 Healthcare & my wishes

MEDICAL

PRIMARY DOCTOR & PHONE

PHARMACY

ALLERGIES

MAJOR CONDITIONS

BLOOD TYPE

WHERE MY ADVANCE DIRECTIVE / LIVING WILL IS KEPT

ORGAN DONOR? (Y/N)

MEDICATIONS

MEDICATION	DOSE	PRESCRIBING DOCTOR

ONE LAST THING

You Just Listed Everything You've *Built*

Go back through it. If you put a ★ next to anything on the money pages, an account you don't fully understand, a fee you've never seen, a product someone talked you into years ago, that star is worth a straight second look while there's still time to do something about it.

Here's the quiet part. Every one of those stars doesn't just follow you. It gets handed to the people you love. The account nobody understood becomes the one they have to untangle, at the worst possible time, without you there to explain it.

Start with the stars that actually matter.

START WITH THE 10-MINUTE CHECK

You just listed accounts, policies, and the people who handle them. Some of what you wrote down may be quietly working against you right now, a fee draining it, a product you were talked into, someone who was never really on your side. The 10-Minute Check is a short, free walkthrough that shows you how to spot the leaks and check anyone handling your money, in about the time it takes to make a cup of tea. It's the first step to stopping them and keeping more of your money.

DrRouseNow.com/check

Educational only. Not personal financial, investment, or tax advice. No guarantee of results.
This organizer is a tool for gathering your own information and is not a will, trust, or advance directive.