

In Case of Emergency: *20 things* your family needs to know.

A simple checklist to make sure the people you love are never left guessing — about your accounts, your wishes, or where anything is.

The average person has **over 100 online accounts**. If something happened to you tomorrow, would your family know where to start? For most households, the honest answer is no — and the search can take months.

HOW TO USE THIS CHECKLIST

- 1 Work through the 20 items.** For each one, note where the information lives — not the passwords themselves, just where to find them.
- 2 Store it somewhere safe** — a fireproof box, a safe, or with your important papers. Never email it or leave it out.
- 3 Tell one trusted person it exists** and where it is. A checklist nobody can find helps nobody.

The People

Who your family should call first

☐ 1. Your first-call person

The one person who should be notified immediately and can help coordinate everything else.

Name & phone: _____

☐ 2. Where your will & estate documents live

Will, trust, power of attorney, healthcare directive — the originals, not copies.

Location: _____

☐ 3. Your attorney and executor

Who drafted your documents, and who you've named to carry out your wishes.

Names & contacts: _____

☐ 4. Doctors, medications & health records

Primary physician, current medications, and where medical records or a health portal login can be found.

Where to find it: _____

The Money

Accounts, bills, and what's owed or owned

☐ 5. Where you bank

Every institution — checking, savings, credit unions, online-only banks your family may not know exist.

Institutions: _____

☐ 6. Bills on autopay

Mortgage, utilities, phone — what gets paid automatically, and from which account.

Where the list lives: _____

☐ 7. Insurance policies

Life, home, auto, health — carriers, policy numbers, and where the documents are kept.

Location: _____

☐ 8. Retirement & investment accounts

401(k)s, IRAs, brokerages — including old accounts from past employers that are easy to forget.

Institutions: _____

☐ 9. Safe, safe-deposit box & keys

Where they are, and where the key or combination can be found.

Where to find it: _____

Remember: never write actual passwords on this checklist. Write down *where* they're stored — "in my password manager," "in the fireproof box" — so the right person can find them, and no one else can.

The Digital Keys

Access to your digital life — the part most families miss

☐ 10. Your phone passcode

The single most important key — most account recovery flows run through your phone.

Where it's written down: _____

☐ 11. Your primary email account

The email address where password resets land. Whoever controls it can recover almost everything else.

Address & access notes: _____

☐ 12. Your password manager

Which one you use, and where the master password or emergency-access kit is stored.

Where to find it: _____

☐ 13. Two-factor backup codes

Printed backup codes for critical accounts — without them, two-factor security locks your family out too.

Location: _____

☐ 14. Crypto wallets & seed phrases

If no one knows where your seed phrase is stored, cryptocurrency is lost permanently. No exceptions.

Where it's stored: _____

The Practical Things

The everyday details that keep a household running

☐ 15. Deeds, titles & spare keys

Property deeds, vehicle titles, and where spare house and car keys are kept.

Location: _____

☐ 16. Subscriptions & memberships

Streaming, gym, software, deliveries — what should be canceled so it doesn't quietly charge for years.

Where the list lives: _____

☐ 17. Pet care instructions

Who should take them, their vet, medications, and routines.

Where to find it: _____

The Wishes

What you want — said clearly, while you can say it

☐ 18. Funeral & memorial preferences

Burial or cremation, service or celebration — decisions your family shouldn't have to guess at while grieving.

Where it's written: _____

☐ 19. What happens to your social media

Memorialize, delete, or download — for each account, so profiles don't linger in limbo or get hacked.

Your wishes: _____

☐ 20. A message for the people you love

A letter, a recording, or simply where to find the words you'd want them to have.

Where to find it: _____

You've just done more than most people *ever will*.

Checking these 20 boxes puts your family miles ahead. But you may have noticed something as you worked through it: the checklist tells your family **where to look** — it doesn't organize what they'll find. The account numbers, the contacts, the instructions, the wishes — those still live in a dozen different places.

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