HEALTH THERAPIES LIFESTYLE

FAMILY PREPAREDNESS CHECKLIST

A practical guide to help your family organise important information, prepare for the unexpected, and protect what matters most.

Prepared for: ____

Date started: ___________________ **Last reviewed:** ___________________

Where this checklist is stored: __________________________________

Preparedness is not about expecting the worst. It is about giving the people you love clarity, confidence, and a practical plan when decisions matter most.

Building Healthier Lives, Stronger Families, and Lasting Legacies.

How to Use This Guide. Start with what you know

Complete this checklist gradually. Some information is easy to gather today; other items may require a conversation with family members or a professional. Keep sensitive records secure, tell at least one trusted person where essential information can be found, and review the checklist at least once a year or after a major life change.

- Choose one trusted family member or representative who knows where this information is stored.
- Keep original legal, financial, and identity documents in a secure location.
- Do not place passwords, PINs, or full account credentials in an unsecured printed copy.
- Update contact details, medications, insurance information, and personal wishes whenever they change.

1. Emergency Contacts

Create one reliable contact list so family members do not have to search for information during an emergency.

Primary emergency contact	Name: ____________________________ Phone: ____________________________
Secondary contact	Name: ____________________________ Phone: ____________________________
Physician / medical practice	Name: ____________________________ Phone: ____________________________
Preferred hospital	____ _
Pharmacy	Name: ____________________________ Phone: ____________________________
Attorney	Name: ____________________________ Phone: ____________________________
Financial / insurance contact	Name: ____________________________ Phone: ____________________________
Family Legacy Support contact	____ _

- Family members know who should be contacted first.
- Emergency contacts are also saved in relevant mobile phones.
- A paper copy is accessible if phones or internet service are unavailable.

2. Important Documents

Record where key documents are kept. Avoid carrying originals unnecessarily.

- Birth certificates
- Passports and immigration / citizenship documents
- Driver's licenses or state identification
- Marriage, divorce, adoption, or name-change documents
- Social Security or national identification records
- Property deeds, titles, leases, and vehicle titles
- Wills, trusts, powers of attorney, and advance directives
- Life, health, home, auto, and other insurance policies
- Funeral, cremation, burial, or repatriation arrangements

Primary document location	____ _
Backup / digital location	____ _
Person with authorised access	____ _

3. Medical Information

Keep essential health information current and easy to locate. This page is for organisation only and does not replace medical records or professional medical advice.

Primary doctor	____ _
Specialists	____ _
Health insurance	Provider: _______________________ Member ID location: _________________
Allergies	____ _
Current medications	List stored at: ____
Important medical history	____ _
Mobility / communication needs	____ _
Preferred hospital / facility	____ _

- Medication list includes dose and prescribing clinician.
- Emergency contacts know about significant allergies.
- Copies of advance directives are available to the appropriate people.

4. Financial Information

Create a map of your financial life without placing sensitive access codes in an unsecured document.

- Banks and credit unions
- Mortgage, rent, or property obligations
- Credit cards and major recurring bills
- Retirement, pension, investment, or brokerage accounts
- Life insurance and beneficiary information
- Business ownership or partnership interests
- Loans and other significant liabilities
- Tax preparer / accountant contact details

Financial records stored at	____ _
Trusted person / representative	____ _
Accountant / adviser	____ _

5. Digital Assets & Passwords

Digital access can be essential, but passwords must be protected. Use a reputable password manager or another secure method rather than writing passwords directly in this checklist.

- Primary email accounts identified
- Mobile phone and device access plan documented securely
- Password manager / secure credential location identified
- Cloud storage and important digital files identified
- Social media accounts identified
- Online banking / payment platforms identified
- Business websites, domains, subscriptions, or online stores identified
- Instructions exist for digital photos, documents, and other important digital assets

Secure credential location	____ _
Trusted digital contact	____ _

6. Caregiving Instructions

If someone depends on you, document the routines and information another person would need to continue their care.

- Children or dependent family members
- Older relatives or adults requiring assistance
- Medication and appointment routines
- Mobility, dietary, communication, or accessibility needs
- School, care facility, home-care, or support-service contacts
- Pets: veterinarian, feeding, medications, and temporary caregiver
- Household routines that are important for continuity

Primary caregiver / backup	____ _
Important instructions stored at	____ _

7. End-of-Life Preferences

These conversations can spare families uncertainty later. Record your wishes and make sure formal legal or medical documents are completed where appropriate.

- Advance healthcare directive / living will considered or completed
- Healthcare power of attorney / proxy identified
- Will or estate plan considered or completed
- Funeral, memorial, burial, or cremation preferences discussed
- Repatriation or expatriation wishes documented if relevant
- Religious, cultural, family, or personal traditions recorded
- Preferred people to contact at time of death identified
- Important personal messages or instructions preserved

Important: Requirements for wills, advance directives, powers of attorney, and funeral arrangements vary by jurisdiction. Use qualified legal, financial, medical, or funeral professionals when formal documentation is required.

8. Family Communication Plan

A plan is only useful if the right people know it exists.

- Choose a primary family coordinator.
- Choose a backup coordinator.
- Decide how family members will communicate if normal phone service is disrupted.
- Identify an out-of-area contact if appropriate.
- Agree where family members should meet during a local emergency.
- Tell trusted people where essential documents are stored.
- Schedule a yearly family preparedness review.

Primary family coordinator	____ _
Backup coordinator	____ _
Meeting / communication plan	____ _

9. Family Legacy Notes

Preparedness is also about preserving the things that cannot be replaced: stories, values, history, and messages for the next generation.

- Write down important family names, dates, places, and relationships.
- Record family stories and traditions.
- Organise photographs and identify the people in them.
- Preserve recipes, letters, recordings, and meaningful keepsakes.
- Record values or life lessons you want future generations to remember.
- Write personal messages to children, grandchildren, or other loved ones.

One thing I want my family to always remember:

____

____

____

____

____

10. 30-Minute Action Checklist

You do not have to complete everything today. Start with these ten actions.

- Name your primary emergency contact.
- Locate your identification and key legal documents.
- Update your current medication list.
- Identify your insurance policies.
- Write down where financial records are stored.
- Choose a secure method for digital passwords and credentials.
- Identify who would care for dependents or pets temporarily.
- Discuss your most important healthcare and end-of-life wishes.
- Tell one trusted person where this preparedness information is stored.
- Choose a date to review and update this checklist.

Small steps today can prevent confusion tomorrow. Prepared families are not families without challenges - they are families with clearer information, stronger communication, and a plan.

About. Health Therapies Lifestyle

Health Therapies Lifestyle is built around education, compassion, community, and hope. Our resources are designed to help individuals and families make more informed choices about wellness, preparedness, technology, and long-term wellbeing.

Our guiding purpose: Building Healthier Lives, Stronger Families, and Lasting Legacies.

Next Steps

- Complete the sections most relevant to your household.
- Store the finished checklist securely.
- Share its location with a trusted family member.
- Review it annually and whenever there is a major change in your family, health, finances, residence, or legal arrangements.
- Explore additional educational resources in the Health Therapies Lifestyle Resource Library.

Educational Disclaimer
This checklist is provided for general educational and organisational purposes. It is not legal, medical, financial, insurance, or funeral-planning advice. Individual needs and legal requirements vary. Consult appropriately qualified professionals for advice specific to your circumstances.