Family Emergency & Legacy Binder - Print & File

Free working edition 0.12 | November 2, 2026 | David Tom Publishing

A household reference you can build one useful handoff at a time. Choose a question someone may need to answer, record where the current information lives, and test the route with a trusted helper.

Included: all 46 established worksheet records and 18 pocket-cover records, with their existing codes and blank fields. Longer records span several physical pages for readable labels and writing room. The minimum-handoff PDF is a subset, not an additional product you need to buy.

Keep completed copies private. This binder is an organizer, not a will, trust, power of attorney, medical order, beneficiary designation or grant of account access. For an immediate life-threatening emergency in the United States, call 911; do not delay for this workbook.

Start with the separate minimum-handoff pack or the seven records named in 00-B. Use the complete edition as a reference and add only relevant sections. A record marked unknown with a next action is more useful than a guessed answer.

No hardware, physical delivery or online vault is included. The separate online builder is not activated or certified by these documents. The attorney-preparation and home-inventory working editions at davidtompublishing.com are optional companions; keep one master record and use references rather than duplicate sensitive details.

Print one test section first. Letter and A4 files have a 64-point left margin for binding, but actual printer scaling and hole-punch fit need checking. Read the source and review notes at X-B before relying on this edition.

This subset contains the seven minimum-handoff records, welcome/setup/index pages, continuation record X-A and sources X-B. Pocket covers are in the complete edition.

00-A - Family Emergency & Legacy Binder

A practical handoff guide for the people you trust.

Record the essentials. Add the right documents. Walk someone through the plan.

Private when completed. Keep this binder secured; display only the separate emergency sheet. This workbook is an organizer, not a will, trust, power of attorney, medical order, or beneficiary designation.

US-oriented edition. Adapt emergency numbers and obtain local professional advice outside the United States. You may skip any section that does not apply.

Prepared for / household name	**Primary trusted contact**
Backup trusted contact	**Date completed / last reviewed**
State / country of residence	**Secure binder location**
Secure backup location	

00-B - Set up your binder

Start small. The first useful version does not need every page completed.

This downloadable Print & File working edition contains 46 worksheet records and 18 pocket-cover records. Some records span more than one printed page. Page codes, rather than physical page numbers, connect the files. No physical binder, pocket hardware or online service is supplied.

Minimum handoff: start with 01-A, 02-A, 04-A, 07-A, 08-A, 09-A and 11-A. The separate minimum-handoff pack includes these seven records plus introductory and source notes. Mark information reviewed only after checking it. A blank does not mean no record exists.

Write by hand or use the editable Word copy. These PDFs have no fillable fields and perform no automatic actions. Completed files are not encrypted by this workbook; check your device storage and sharing settings.

Print a small single-sided sample at actual size on the matching Letter or A4 paper. Check writing space, print scaling, page turns and hole-punch clearance with your own binder before a full print run. Physical fit has not been tested here.

Put matching pocket covers behind their numbered sections. A cover is an index, not a physical pocket. Record every included copy and the original location in section 18. Keep sensitive originals separately as advised.

Never write passwords, PINs, recovery codes, Social Security numbers, full financial account numbers, seed phrases or private keys in this binder. Use non-secret location references. Keep secret recovery materials separately secured.

Ask a trusted helper to find the first-call contact, original-document locator, next bill and approved access route without coaching. Use 21-A and 21-B to record gaps, corrections and the next review.

Use X-A for longer answers or copy the relevant record again. Write the parent page code and record identifier on every continuation. There is no need to finish every section before making one useful handoff.

00-C - Find the right section

Page codes stay useful even after you insert your own documents.

01 - Start here & authority

02 - Emergency reference

03 - Home & safety

04 - Primary contacts

05 - Additional contacts

06 - Health & care

07 - Legal & identity

08 - Financial map & insurance

09 - Household bills

10 - Digital subscriptions & cloud

11 - Digital access & devices

12 - Employment & benefits

13 - Home & property

14 - Vehicles

15 - Dependents & pets

16 - Funeral & memorial

17 - Notifications

18 - Document index

19 - Handoff actions & logs

20 - Personal messages

21 - Review & updates

22 - Business & special assets

01-A - Start here

For the trusted person using this binder. Complete this page before the detailed records.

For immediate danger or a life-threatening emergency in the US, call 911. For an anticipated death under hospice, follow the written hospice plan and contact the hospice team. [S2]

Do not move money, distribute property, impersonate the account holder, or cancel key services based only on this binder. Confirm your authority and the provider process first. [S1]

Person this binder concerns	**Pronunciation / preferred name**
Call first: name and relationship	**Phone / backup phone**
Backup contact	**Phone / best way to reach**
Attorney / legal contact	**Phone / email**
Healthcare representative: see 01-B	**Financial / estate representative: see 01-B**
Urgent care / medication summary location	**Original legal documents location**
People, dependents or pets who need immediate attention	**Essential services or deadlines to protect first; do not act without authority**

02-A - Emergency reference sheet

The only page intended for optional fridge display. Choose what is safe to display.

EMERGENCY POLICE / FIRE / AMBULANCE: 911 (United States). Call first for life-threatening emergencies. [S2]

Do not display passwords, alarm codes, account numbers, birth dates, diagnoses or the location of valuables. Ask household members before posting their contact details. Hospital main lines are not emergency dispatch.

Home address, apartment / unit and city	**Nearest cross streets / safe responder directions**
Primary contact - Phone	**Primary contact - Location / useful notes**
Backup contact - Phone	**Backup contact - Location / useful notes**
Alarm / monitoring company - Phone	**Alarm / monitoring company - Location / useful notes**
Hospital / ER - Phone	**Hospital / ER - Location / useful notes**
Hospital / ER - Phone	**Hospital / ER - Location / useful notes**
Local non-emergency service - Phone	**Local non-emergency service - Location / useful notes**

02-A - Emergency reference sheet

Building / HOA / security - Phone

Building / HOA / security - Location / useful notes

Emergency meeting location

Last checked

04-A - Primary contacts

Choose people who have agreed to help. Keep contact roles separate from legal authority.

Contact 1: full name

Relationship / practical role

Primary phone

Alternate phone / email

Address / preferred contact method / availability

Contact 2: full name

Relationship / practical role

Primary phone

Alternate phone / email

Address / preferred contact method / availability

Contact 3: full name

Relationship / practical role

Primary phone

Alternate phone / email

Address / preferred contact method / availability

07-A - Legal document locator

Record what actually exists and where the signed originals can be found.

This workbook does not create or amend these documents. Do not remove staples, mark up, discard or replace signed originals based on this organizer. Ask the attorney how originals and copies should be stored.

ADD COPIES | Pocket 07-LEGAL Clearly labeled reference copies, or location slips when the documents are stored separately.

Will / codicils - Status / date

Will / codicils - Original location

Will / codicils - Copy ID / contact

Trust / amendments - Status / date

Trust / amendments - Original location

Trust / amendments - Copy ID / contact

Financial power of attorney - Status / date

Financial power of attorney - Original location

Financial power of attorney - Copy ID / contact

Healthcare directive / POA - Status / date

Healthcare directive / POA - Original location

Healthcare directive / POA - Copy ID / contact

Medical orders, if any - Status / date

Medical orders, if any - Original location

Medical orders, if any - Copy ID / contact

Digital-asset authorization - Status / date

07-A - Legal document locator

Digital-asset authorization - Original location

Digital-asset authorization - Copy ID / contact

Guardian nomination / care authority - Status / date

Guardian nomination / care authority - Original location

Guardian nomination / care authority - Copy ID / contact

Other legal agreement - Status / date

Other legal agreement - Original location

Other legal agreement - Copy ID / contact

Attorney / firm / phone

Local jurisdiction / last review date

Missing items or inconsistencies to discuss with a qualified attorney

08-A - Financial account map

A directory, not permission to transact. Repeat for every institution and account type.

Consider checking, savings, brokerage, retirement plans, pensions, education savings, health savings, cash-value policies and digital-asset platforms. Do not assume accounts at the same institution have the same ownership or beneficiaries.

ADD COPIES | Pocket 08-FIN Recent dated statements or location slips; redact unnecessary full numbers on convenience copies.

Entry 1 - Institution / type	**Entry 1 - Owner / title**
Entry 1 - Last 4 / record ID	**Entry 1 - Contact / statement location**
Entry 2 - Institution / type	**Entry 2 - Owner / title**
Entry 2 - Last 4 / record ID	**Entry 2 - Contact / statement location**
Entry 3 - Institution / type	**Entry 3 - Owner / title**
Entry 3 - Last 4 / record ID	**Entry 3 - Contact / statement location**
Entry 4 - Institution / type	**Entry 4 - Owner / title**
Entry 4 - Last 4 / record ID	**Entry 4 - Contact / statement location**

08-A - Financial account map

Entry 5 - Institution / type

Entry 5 - Owner / title

Entry 5 - Last 4 / record ID

Entry 5 - Contact / statement location

Entry 6 - Institution / type

Entry 6 - Owner / title

Entry 6 - Last 4 / record ID

Entry 6 - Contact / statement location

Entry 7 - Institution / type

Entry 7 - Owner / title

Entry 7 - Last 4 / record ID

Entry 7 - Contact / statement location

Entry 8 - Institution / type

Entry 8 - Owner / title

Entry 8 - Last 4 / record ID

Entry 8 - Contact / statement location

Primary financial professional / phone

Tax professional / phone

08-A - Financial account map

Missing institutions, records to request or account access questions

09-A - Household bills & essential services

Core living expenses only. Digital subscriptions belong in section 10.

ADD COPIES | Pocket 09-BILLS Recent bills, renewal notices and service instructions; use 09-B for detailed records.

Housing / mortgage / rent - Amount / cycle

Housing / mortgage / rent - Due / autopay

Housing / mortgage / rent - Paid from / record ID

HOA / property tax - Amount / cycle

HOA / property tax - Due / autopay

HOA / property tax - Paid from / record ID

Electric / gas - Amount / cycle

Electric / gas - Due / autopay

Electric / gas - Paid from / record ID

Water / sewer / trash - Amount / cycle

Water / sewer / trash - Due / autopay

Water / sewer / trash - Paid from / record ID

Internet - Amount / cycle

Internet - Due / autopay

Internet - Paid from / record ID

Phone - Amount / cycle

09-A - Household bills & essential services

Phone - Due / autopay

Phone - Paid from / record ID

Home / auto insurance - Amount / cycle

Home / auto insurance - Due / autopay

Home / auto insurance - Paid from / record ID

Alarm / monitoring - Amount / cycle

Alarm / monitoring - Due / autopay

Alarm / monitoring - Paid from / record ID

Other essential service - Amount / cycle

Other essential service - Due / autopay

Other essential service - Paid from / record ID

Bills mailbox / email receipts location

Next review date

Services that need continuity; people or equipment affected by interruption

11-A - Digital emergency access plan

An access roadmap, not a password notebook. Arrange access while you can test it.

Keep master passwords, recovery codes, private keys and seed phrases outside the general binder. Do not make the only recovery instructions available solely inside the locked account they recover.

Apple Legacy Contact does not provide iCloud Keychain passwords or passkeys. Google Inactive Account Manager shares selected data after inactivity; it is not an immediate password handoff. [S3-S5]

ADD COPIES | Pocket 11-ACCESS Non-secret recovery roadmap and provider instructions only. Keep secret recovery material separately.

Password manager / account owner	**Approved emergency contact / phone**
Emergency access feature / status / wait period	**Last successful check / checked with whom**
Separate secure recovery kit location reference	**Recovery kit custodian / phone**
Primary email / recovery route reference	**Phone service needed for account recovery**
Authenticator / passkey / hardware-key plan reference	**Encrypted device recovery-key location reference**
Independent access route if the phone, email or password vault is unavailable	**Who should receive access, limits, and provider or legal steps to confirm**

X-A - Continuation / custom record

Repeat as needed and file beside the related page, not only at the back of the binder.

Related section / page code	**New record ID / person / account**
Subject / status	**Completed by / date**
Additional information	**Documents attached / exact location / follow-up**

X-B - Sources & scope

Provider procedures and laws can change. Verify the current rule before acting.

[S1] CFPB: Managing someone else's money; Help for agents under a power of attorney. Distinct fiduciary roles, recordkeeping and end of an agent's authority when the person dies. https://www.consumerfinance.gov/consumer-tools/managing-someone-elses-money/ | https://files.consumerfinance.gov/f/documents/cfpb_msem_national_agents_guide.pdf

[S2] USA.gov: Agencies to notify when someone dies. https://www.usa.gov/report-a-death | National 911 Program: Calling 911. https://www.911.gov/calling-911/

[S3] Apple Support: How to add a Legacy Contact for your Apple Account. Requirements and excluded iCloud Keychain data. https://support.apple.com/en-us/102631

[S4] Google: About Inactive Account Manager. Selected data after an inactivity period, not immediate password handoff. https://support.google.com/accounts/answer/3036546

[S5] Google: Submit a request regarding a deceased user's account. Google does not provide passwords or other login details. https://support.google.com/accounts/troubleshooter/6357590

[S7] NYC Emergency Management: Be Ready New York. Leave suspected gas/electrical hazards and follow official instructions. Local utility procedures still control. https://www.nyc.gov/site/em/ready/be-ready-new-york.page

Sources rechecked November 2, 2026. Citation gaps retain the established source IDs; older S6/S8 search-only references are not relied on in this edition. Hospice references are prompts to follow the person's actual written care plan, not a universal medical procedure. Beneficiary fields organize questions; they cannot change a provider's records.

Free public working edition 0.12, derived from the existing DTP 0.10 field schema. No listed source endorses DTP. This organizer does not provide legal, tax, investment or medical advice, create authority or guarantee access. No qualified professional signoff is claimed.

Reader, native Word, physical-print and assistive-technology acceptance remain open. PDFs are untagged; no PDF/UA compliance is claimed. The editable Word file is an alternative format, not a claim of completed accessibility testing.