START HERE

Alex Morgan

If Alex has died or cannot speak for themselves, start on this page.
Everything here was written down by Alex.

If Alex has died
Go to the first-week checklist, page 10.

If Alex is alive but cannot speak
Go to health and care wishes, page 7.

CALL FIRST

Sam Morgan

Son

(202) 555-0111

THEN CALL

Jordan Reed

Neighbor

(202) 555-0222

checked 1 July 2026

Do this today	**Feed Pip and let him out. Sam has the spare key.**
Where the will is	Top drawer of the study cabinet, in the blue folder.
Who can fetch it	Sam has the cabinet key. Ask Sam to collect the original and contact the named adviser.
The whole guide is	Saved in the family Google Drive folder, and a printed Start-here page is at Hall shelf beside the phone.

For the registrar: full legal name, date of birth and place of birth were not recorded. Ask Sam Morgan.

Signed by Alex Morgan

Date

If you have found this and do not know the family, please call Sam Morgan on (202) 555-0111.

Every fact in this guide was recorded by Alex Morgan and last confirmed on 21 September 2026.

Prepared for the people Alex chose. Not legal, financial, tax or medical advice. Naming a person does not grant authority.

What is in this guide

Sections 01 to 07 record what Alex wrote down. 08 is the order to work in; 09 records what was handed over.

	Start here	1
01	People to contact	3
02	Where documents are	3
03	Money and bills that keep running	4
04	Home, pets and daily life	6
05	Health and care wishes	7
06	Digital life	7
07	Wishes and instructions	8
08	First-week checklist	10
09	Handoff record	12

If you have just arrived

1. Call Sam Morgan on (202) 555-0111.
   See People to contact, page 3
2. If Sam Morgan does not answer, call Jordan Reed on (202) 555-0222.
   See People to contact, page 3
3. Feed Pip and let him out. Sam has the spare key.
   See Home, pets and daily life, page 6

01

People to contact

Who to reach first, and who else knows the family.

CALL FIRST

Sam Morgan
Son

(202) 555-0111

THEN CALL

Jordan Reed
Neighbor

(202) 555-0222
checked 1 July 2026

People your family can turn to

Contact	Harbor Estate Counsel
Role	Legal adviser
Backup contact	Sam Morgan, Son, (202) 555-0111

02

Where documents are

Where the original papers are kept and who can fetch them.

Important papers	The blue family folder is in the study cabinet.

About you

Names used on records	Alex Morgan
Family and dependents	Sam is my son. Jordan is my neighbor. Neither depends on me for daily care.

02

Where documents are continued

Original will

Document type	Will
Original location	Top drawer of the study cabinet, in the blue folder.
Who can retrieve it	Sam has the cabinet key. Ask Sam to collect the original and contact the named adviser.

03

Money and bills that keep running

Accounts, providers and bills that keep running after a death.

Everyday Checking

Bank or service	Everyday Checking at Example Bank
Statement and contact	Monthly statement in the study folder. Contact the bank using the number on that statement.
Payments linked to account	Sam can help find the statement. Ask the bank what it needs before making changes.

Retirement, pensions and annuities

Retirement account or plan	Retirement account at Example Pensions

03 Money and bills that keep running continued

Retirement, pensions and annuities continued

Provider and records	The latest provider letter is in the retirement folder. Contact the provider to ask about next steps.

Insurance

Insurer and policy location	Example Cover, policy in the insurance folder
Agent or claims team	Contact the claims team using the current policy letter
Premium payment	Payment comes from Everyday Checking. Ask the insurer before changing the payment arrangement.

Loans and other obligations

Lender and records	Example Home Lending, statements in the kitchen folder
Notice to check	Sam knows where the loan papers are kept. Use the lender contact printed on the statement.

Income and benefits

Income or benefit provider	Example Workplace benefits
Official contact and papers	The employer contact and benefits letter are in the work folder. Sam can help find them.

03

Money and bills that keep running continued

Electricity

Bill provider and household	Example Electric for the main home
Automatic or manual payment and source account	Auto-pay from Everyday Checking
Schedule and bill location	Paper bill in the kitchen folder
Reason to review before changing	Keep the service running while the home is occupied. Ask the provider before changing the account.

04

Home, pets and daily life

The house, the pets and the things that need doing this week.

Immediate care or household need	Feed Pip and let him out. Sam has the spare key.

Property, vehicles and belongings

Location	The family home
Handling concern	Water shutoff instructions are beside the laundry door. Ask Sam for help.
Vehicle records and contact	The car papers are in the property folder. Jordan can help find the current registration.

04 Home, pets and daily life continued

Pip

Immediate household instruction	Feed Pip and let him out. Sam has the spare key.
Key holder	Sam has the spare key. The key tag says front door.

05

Health and care wishes

Care contacts and the papers that describe them.

Care information that is easy to find

Care team	My clinic contact is on the care folder cover. Ask Sam to help find it.
Medication and allergy list	The current medication and allergy list is in the care folder. Ask my care team to review it.

06

Digital life

Accounts, devices and the arrangements already recorded.

Digital belongings

Email, phone and devices	Family email and shared photo library

06 Digital life continued

Digital belongings continued

Connected services	Access arrangements are recorded with the provider. Ask Sam to check the provider instructions.

Digital access arrangements

Access arrangement	Google Inactive Account Manager
Setup status	I recorded the setup in my handoff notes. Sam knows where the provider instructions are kept.

07

Wishes and instructions

What Alex asked for, in Alex's own words.

Wishes and people to notify

Arrangement helper and plan

Please keep the gathering simple and include the people closest to us.

People to notify

Sam can help find the note with my music choices in the wishes folder.

07

Wishes and instructions continued

Messages and a personal playbook

Messages and keepsakes

Please look after one another and take time to talk through decisions together.

NOTES AND MESSAGES

08

First-week checklist

The order to work in. Tick things off as they are done.

After a loss, use the details below. Ask providers what they need. This guide gives no authority to act.

TODAY

- [ ] Call first: Sam Morgan.
  See People to contact, page 3.
- [ ] Then call: Jordan Reed.
  See People to contact, page 3.
- [ ] Feed Pip and let him out. Sam has the spare key.
  See Home, pets and daily life, page 6.
- [ ] Find the key holder: Sam has the spare key. The key tag says front door.
  See Home, pets and daily life, page 6.

THIS WEEK

- [ ] Find Will.
  See Where documents are, page 3.
- [ ] Call Sam Morgan.
  See People to contact, page 3.
- [ ] Review Everyday Checking.
  See Money and bills that keep running, page 4.

08

First-week checklist continued

THIS WEEK CONTINUED

- [ ] Review Retirement account at Example Pensions.
  See Money and bills that keep running, page 4.
- [ ] Notify Example Cover, policy in the insurance folder.
  See Money and bills that keep running, page 4.
- [ ] Notify Example Home Lending, statements in the kitchen folder.
  See Money and bills that keep running, page 4.
- [ ] Notify Example Workplace benefits.
  See Money and bills that keep running, page 4.
- [ ] Check auto-pay for Electricity.
  See Money and bills that keep running, page 4.
- [ ] Review The family home.
  See Home, pets and daily life, page 6.
- [ ] Review Family email and shared photo library.
  See Digital life, page 7.
- [ ] Review Wishes and people to notify.
  See Wishes and instructions, page 8.

BEFORE THE MONTH ENDS

- [ ] Review the Handoff record with your helpers.

09

Handoff record

What the owner confirmed, and when.

WHAT WAS HANDED OVER	WHAT THE OWNER CONFIRMED	RECORDED
Family PDF saved to Drive	Owner confirmed revision 83 in their Omliva Google Drive folder	21 September 2026
Folder shared with	Sam Morgan, Son	21 September 2026. Omliva could not confirm the recipient's access.
Inactive-account option	Owner confirmed Google Inactive Account Manager setup	21 September 2026
Printed Start-here page	Hall shelf beside the phone	21 September 2026

These are the owner's recorded confirmations. They are not a check of provider permissions or proof that another person can open the folder.

NOTES FOR THE FAMILY