

Personal Information Handoff Planner

Show a trusted person where to start without sharing everything.

Use a hypothetical one-week absence to identify practical gaps. Keep this worksheet with your own records. The exercise is a conversation, not permission to log in or make transactions.

Date: _____ Prepared with (optional): _____

A walkthrough of the starting point

1. Where should the helper look first, and how would they obtain appropriate access?
2. Which responsibility could not wait for a week, and who is authorized to address it?
3. Which step still depends on your memory, phone, or an unclear instruction?

Starting location or contact to explain

An essential task and the proper person to ask

A permission or authority question to resolve

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Show a trusted person where to start without sharing everything.

The gaps to resolve

Choose no more than two next steps. Ask the proposed person to agree before treating a task as assigned. A target date below is your planning date, not a legal deadline.

Next step 1: What needs to happen?

Person who agreed: _____ Target date: _____

How will we know it is done? _____

Next step 2: What needs to happen?

Person who agreed: _____ Target date: _____

How will we know it is done? _____

Question to take to an attorney, clinician, institution, or other professional

Next check-in: _____ Person to contact: _____

Keep the limits clear. This planner organizes a conversation. It does not grant account access, amend an estate plan, or replace a comprehensive personal-information organizer. Do not enter passwords, recovery codes, Social Security numbers, full account numbers, or detailed medical information here.