THE GUIDANCE I PREPARED FOR MY FAMILY

My Family Plan

A clearer place to begin.

Alex Example - SAMPLE

Generated November 19, 2026 at 2:59 PM EST

The people, wishes and practical details I have recorded so far - brought together to help the people I love find their way.

INSIDE MY PLAN

Start here	2
In the first few days	3
My people	4
Wishes and practical guidance	5
Important documents	13
Personal items	14
Preparation summary	15

PRIVATE ACCOUNT COPY

Keep and share this copy carefully. It may be unfinished. Downloading sends nothing and starts no delivery.

FOR THE PEOPLE I LOVE

Start here.

You do not have to work everything out at once. Start with the people who can help, then use my recorded guidance and document locations.

MY EXECUTOR

Taylor Example

1 of 1 with an email recorded

MY WILL / IMPORTANT ORIGINAL

Home study, top drawer of the filing cabinet

See Important documents for all locations

MY WISHES

Some wishes recorded

Read the guidance; some details may be missing

SOMETHING PERSONAL

1 personal item

See the Personal items index

A few things to know

This is a summary of what I have recorded, not a statement that every task is complete. Missing answers are not instructions.

Use the PDF bookmarks to find a section. My private letter text, recordings, photos and uploaded files are not embedded in this copy; their indexes describe what I have prepared.

The Preparation summary at the end explains the DFC delivery safeguard and my current setup. This account copy differs from each recipient's assigned delivery.

PRACTICAL GUIDANCE

In the first few days

Start with the immediate responsibilities I recorded. The rest of this guide holds fuller details. Missing information is not an instruction.

What would your family need to know in the first few days?	Please ask Sam to help Jamie with meals and Poppy for the first few days. Taylor has the practical contact list.

What would your family struggle to figure out?

The kitchen folder holds household contacts. The signed original Will is in the home study; Taylor knows where the key is kept.

What needs attention at home?

Sam knows the dog routine. The home maintenance contact card is in the kitchen folder. Please keep essential household services running while arrangements are settled.

THE PEOPLE I CHOSE

My people

My executor receives the executor package. My Notification Circle independently protects the release. Other people receive only the personal items I chose for them.

TE

Taylor Example

My executor
taylor@example.test

ME

Morgan Example

Notification Circle
morgan@example.test

SE

Sam Example

Notification Circle
sam@example.test

JE

Jordan Example

Notification Circle
jordan@example.test

THE GUIDANCE I RECORDED

My wishes and practical guidance

These are my recorded wishes and practical details. Where information is missing or uncertain, ask the appropriate people before acting.

ABOUT ME

Identity paperwork	Home study, blue folder labelled Identity.
Full name	Alex Example - FICTIONAL SAMPLE
Preferred name	Alex
Occupation	Retired teacher
Relationship status	Married
Spouse or partner's full name, if applicable	Jamie Example
What would your family need to know in the first few days	Please ask Sam to help Jamie with meals and Poppy for the first few days. Taylor has the practical contact list.

What would your family struggle to figure out

The kitchen folder holds household contacts. The signed original Will is in the home study; Taylor knows where the key is kept.

FAMILY, CARE AND SUPPORT

Person to take the lead

Taylor Example. Please talk with Jamie before making arrangements. You do not have to handle everything alone.

Someone to ask	Morgan Example knows our family traditions and can help with practical questions.
My pets	I have pets.

Pets and their care

Pet 1
Pet name / type: Poppy - our dog
Who should care for them: Jamie, with Sam helping for the first week
Vet / contact: Example Veterinary Clinic - contact card in the kitchen folder
Food, medication or care notes: Food and walking routine are on the fridge. Her lead is by the back door. Keep her familiar blanket with her.

What needs attention at home

Sam knows the dog routine. The home maintenance contact card is in the kitchen folder. Please keep essential household services running while arrangements are settled.

MY FINAL ARRANGEMENTS

My wishes for my body	I prefer cremation.
If cremated, what I would like done with my ashes	Please keep my ashes with the family until you decide on a place together.
Service or gathering	Private family gathering

Funeral arrangements	I have not prepaid or arranged funeral services.
Funeral home / provider	No provider chosen. Taylor and Jamie may compare local providers; please keep arrangements simple.
Anything else about your arrangements	A quiet gathering is enough. Please do not feel you need to spend more to show how much you cared.
Cemetery property	I do not have cemetery property, a crypt or niche recorded in this plan.

CEREMONY AND REMEMBRANCE

Visitation or viewing	Private family only
Ceremony location preference	Somewhere familiar and accessible. Our home or a small community room would be meaningful.

Officiant, clergy or people I would like to speak

Morgan may welcome everyone. Anyone who wants to share a memory should feel welcome, but nobody should feel obliged.

Songs or music I would like

Use the family playlist called Sunday Kitchen. Jamie knows the songs. Keep the music gentle while people arrive.

Flowers or memorial contributions	Charitable donations
Charity name or other memorial wishes	A local food bank, if anyone asks. No one needs to give anything.

Information I do NOT want shared publicly	Please leave financial details and private family disagreements out of the obituary.
Anything else that would make your goodbye feel like you	Let there be laughter as well as tears. Tell the small stories, not just the milestones.

PEOPLE AND ORGANISATIONS TO CONTACT

Anything your executor should know	Taylor Example - taylor@example.test (fictional contact)
Lawyer	Example Legal Office - contact card and signed Will correspondence in the home study.
Accountant / tax professional	Example Accounting Office - latest return and contact card in the Tax folder.
Financial advisor	Example Financial Office - contact details in the Investments folder.
Doctor / health-care contact	Example Family Clinic - contact card in the Health folder.

MONEY, PROPERTY AND RESPONSIBILITIES

Banking, investments & retirement

I have bank, investment or retirement accounts my family may need to locate.

Accounts and where to find the records

Account 1
Account type: Bank / credit union
Institution / provider: Example Credit Union (fictional)
Advisor / contact: Branch contact card in the Banking folder
Where statements or records are kept: Home study, drawer labelled Banking; monthly statements are filed by year.
Account 2
Account type: RRSP / RRIF
Institution / provider: Example Investments (fictional)
Advisor / contact: Advisor card in the Investments folder
Where statements or records are kept: Home study, Investments folder. Please consult the advisor about the required next steps.

Insurance & death benefits

I have insurance or death benefits my family may need to locate.

Policies and benefits

Policy or benefit 1
Type: Life insurance
Insurer / employer: Example Life (fictional)
Agent / contact: Agent card clipped to the policy
Where policy paperwork is kept: Home study, Insurance folder; the policy and latest annual statement are together.

Property, vehicles & valuables

I own property, vehicles or valuables my family may need to locate.

Property and valuables

Property or valuable 1
Type: Home / land
Description / location: Our family home
Where ownership records are kept: Home study, Property folder; deed and current property-tax statement filed together.
Who can help: Taylor and the lawyer can help locate the records.

Mortgages, loans and debts	I have mortgages, loans or other debts my family should review.

Mortgages, loans and debts

Debt or obligation 1
Type: Mortgage
Lender / provider: Example Credit Union (fictional)
Where the records are kept: Home study, Property folder; mortgage statement filed behind the deed.
Debt or obligation 2
Type: Credit card
Lender / provider: Example Credit Union (fictional)
Where the records are kept: Home study, Banking folder; latest statement filed with the monthly records.

Safe-deposit box	I do not have a safe-deposit box recorded in this plan.
Recurring payments	I have recurring bills, subscriptions or payments my family should review.

Recurring commitments

Recurring payment 1
Type: Utilities
Provider / service: Household electricity and water
Where details are kept / who should contact them: Recent bills are in the Kitchen folder. Keep essential services running while the household arrangements are settled.
Recurring payment 2
Type: Membership
Provider / service: Example Community Centre
Where details are kept / who should contact them: Membership details are in the Kitchen folder. Taylor can contact the centre when ready.

Rewards & loyalty memberships	I do not have rewards points or loyalty memberships recorded in this plan.
My business	I do not own or help run a business.

DIGITAL LIFE

Primary email address	alex@example.test (fictional address)
Cellphone number / provider	Example Mobile (fictional) - latest bill in the Kitchen folder.

Password manager or secure access method used

I use a password manager. Separate access instructions are kept with my private papers; no passwords are recorded here.

Where digital-access instructions are stored	Home study, sealed envelope labelled Digital Instructions. Please follow the provider's access process.

My wishes for online accounts

Please preserve family photographs before closing any accounts. Jamie can choose which personal profiles to memorialize.

PEOPLE AND STORIES

Stories, sayings, recipes, celebrations or memories I do not want lost

The first camping trip ended in rain and burnt toast. We still called it our best weekend. Please keep telling the imperfect stories.

Photographs and recordings

Family albums are on the living-room shelf. Digital photographs are in the family archive; Jamie has the separate access instructions.

Guidance for the people I love	Jamie and Taylor know the family best. Give each other room to make decisions at a different pace.

Traditions to continue

Keep Sunday breakfast when you can. It does not need to be every week, and it does not need to look exactly as it did with me.

Things to pass on	The handwritten recipe book is in the kitchen cupboard. The notes in the margins are as important as the recipes.

Are there meaningful belongings with a story or a wish attached

The blue recipe box belonged to my grandmother. It is in the kitchen cupboard; please keep the handwritten notes with it.

IMPORTANT DOCUMENTS

Where the originals can be found.

The original location is the source of truth. Prepared copies are separate and go only to the people I chose.

Original Will

Original	Home study, top drawer of the filing cabinet
Who can help	Taylor Example
Notes	Taylor knows where the key is kept.
Document copy	No copy uploaded

Life insurance policy

Original	Home study, Insurance folder
Who can help	Jamie Example
Notes	Policy and annual statement filed together.
Document copy	No copy uploaded

Property deed / title

Original	Home study, Property folder
Who can help	Taylor Example
Notes	Lawyer correspondence is filed behind the deed.
Document copy	No copy uploaded

FOR LOVED ONES

Something personal, for later.

This is an index of the letters, voice messages, photographs and memories I prepared. The private content is delivered only to the people I chose after the release safeguard.

TL

The little traditions

Letter

For: Jamie Example

ACCOUNT INFORMATION

Preparation summary

Setup information at the time this copy was generated. These statuses describe my preparation; they are not instructions for my family.

MY NOTIFICATION CIRCLE

Invitations	Acceptance not checked in this copy

3 named. At least 3 current acceptances needed. Accepted invitations do not release anything; reporting a death is a separate step.

THE DFC HANDOFF SAFEGUARD

DFC does not monitor for deaths. Three different accepted notifiers must independently report my death before delivery begins. One or two reports release nothing. My executor cannot bypass this safeguard.

Each person receives only the information assigned to them. This complete account summary is different from those individual deliveries.

WHAT THIS PDF INCLUDES

Recorded Planning Guide guidance, people and original document locations, plus indexes of personal items and document copies. Letter text, recordings, photos and uploaded files are not embedded.