

✓ FAMILY PREPAREDNESS CHECKLIST

## The 12 documents your family will need

Most people assume their family will "figure things out." But when something actually happens, the smallest missing detail turns into hours, sometimes weeks, of searching.

Bank accounts can't be accessed. Insurance claims get delayed. Important decisions get stuck. Not because anything is complicated, but because no one knows where anything is.

This checklist covers what people search for, almost every time. Use it to make sure the people you love aren't left searching.

### Work through each one

Tick each item as you confirm it's documented and accessible to your trusted contacts.

- 1 Your will / last testament**

This is the first thing people look for. Without it, decisions around your estate become slower, more complicated, and often stressful for the people you care about.
- 2 Identity documents**

Passport, ID card, birth certificate. Needed for almost everything — legal processes, banks, insurance, and official registrations.
- 3 Bank account details**

Don't just list your primary bank. Families often don't know how many accounts exist, or where they are held.
- 4 Insurance policies**

Life insurance, health insurance, home, car. If your family can't find these, they may never claim what they're entitled to.

↑ In some cases, policies go completely unused.
- 5 Property documents**

Ownership papers, mortgage details, or rental agreements are critical for proving ownership and managing payments.
- 6 Pensions and investments**

Pensions, shares, crypto, savings plans. These are often scattered, and sometimes completely forgotten.
- 7 Debts and liabilities**

Loans and credit card details help your family manage your estate without facing unexpected financial surprises.
- 8 Digital accounts**

From email to social media and cloud storage, a huge part of our lives is now digital. Without access, these accounts (and the memories in them) remain locked forever.
- 9 Medical information**

In an emergency, knowing your medications, allergies, and doctors isn't just helpful, it's critical for your care.
- 10 Emergency contacts**

Provide a clear list of who to call: your solicitor, financial advisor, doctor, and close friends.

Solicitor  
  Financial advisor  
  Doctor  
  Close friend
- 11 Important instructions**

Not legal — just practical. How bills are paid, where things are kept, anything your family should know.

↑ Often the most valuable part of all.
- 12 A clear way to access all of the above**

This is the one people forget. Even if you've organised everything, if no one can access it, it doesn't help. Having a clear, simple access method matters just as much as the documents themselves.

### A simple way to start

You don't need to do everything at once. Start with just three things. That alone puts you ahead of most people.

Your will

Your main bank account

Your main bank account

### Want to make this easy?

AllSet guides you step-by-step and keeps everything in one place, so when it matters, your family already has what they need.

[Get started →](#)