BE SURE THEY KNOW

Preserve what is important now.

The things only you know shouldn't live only in your head.

BeSureTheyKnow.com

Be Sure They Know gives you one private place for the information, instructions, contacts, messages, memories, stories, and meaningful details you want the people around you to know — now, in an emergency, or someday in the future. Start with Essentials for free and add Pro Plus sharing and emergency-access tools if you need them.

INCLUDED WITH ESSENTIALS — FREE

My Contacts

Keep the names and contact details for the people who matter in one organized place. Your Go Team starts here.

My Life Logistics

Bank accounts, insurance providers, subscriptions, utilities. The practical information that keeps things running — and that someone needs to untangle when things change.

Where to Find My Things

Note every important document and where it is stored — will, property deeds, insurance policies. No one should have to search. This checklist becomes much easier when that record exists.

My Instructions

Record your healthcare instructions, personal arrangements, and any decisions you want to make in advance — in your own words, ready to be found when needed.

Pet Care

Who looks after your pets, their daily routine, vet contact details, medications, and any special needs. Easily overlooked — and one of the first urgent practicalities when something happens.

PRO PLUS SHARING AND EMERGENCY TOOLS

Emergency Access and Notifications

Pro Plus adds immediate emergency access, a wallet card, and notifications for the contacts you choose.

Your Go Team

With Pro Plus, set sharing roles and choose who can access particular records and when.

Shared View and Release Controls

Pro Plus includes Full Shared View and the Release Confirmer system. You control what is shared and under which conditions.

PERSONAL KNOWLEDGE AND MESSAGES

Personal Messages

Write a message for someone who matters. Audio and video messages are available with Pro Plus.

Letters to the Future

Save a letter for a future milestone, a new chapter, or a moment you want to recognize.

My Story

Preserve where you came from, what shaped you, and the stories only you can tell.

My Life Soundtrack

Save meaningful songs with the memories and stories that explain why each one matters to you.

Start preserving what matters today.

Essentials is free. Pro Plus adds sharing and emergency access.

Share this checklist freely — it costs nothing, and it may help someone enormously.

When Something Happens

An action checklist for emergencies, incapacity, and the loss of someone close

Checklist download · Free to print · Free to share

This checklist is for the people around you — a partner, adult child, close friend, or anyone who may need to step in on your behalf. It covers three situations: a sudden emergency (accident, medical crisis), incapacity (you are unable to manage your own affairs), and passing. Many steps apply to all three. Work through it at your own pace — the most urgent items come first. You do not need to do everything at once, and it is always fine to ask for help.

1 — RIGHT AWAY: SECURE PERSONAL BELONGINGS

As soon as it is safe to do so, locate and keep the following items together in one place.

BE SURE THEY KNOW CAN HELP
If this person has a Be Sure They Know plan, check the 'Where to Find My Things' section first — it lists exactly where important items and documents are stored.

- [ ] Wallet or purse and all cash
- [ ] Mobile phone
  Keep it charged. Note the PIN or passcode if you know it — you may need it to access accounts or contacts.
- [ ] Car keys and any spare sets
- [ ] House keys, spare keys, and any property access cards
- [ ] Glasses, hearing aids, or other mobility aids
- [ ] Jewellery and watches
- [ ] Medical alert bracelet or personal monitoring device
- [ ] Any handwritten notes, letters, or notebooks nearby
  These may contain personal notes, PINs, or instructions written informally — do not discard them.
- [ ] USB drives, external hard drives, or memory cards

Do not dispose of any personal items until the estate has been assessed by the executor or a legal advisor.

2 — FIRST HOURS: NOTIFY THE PEOPLE WHO NEED TO KNOW

Take a breath first. Then contact the most important people — even a brief message is enough for now.

BE SURE THEY KNOW CAN HELP
Check My Contacts for the people they recorded. If they use Pro Plus sharing, their Go Team may also have assigned access or emergency roles.

- [ ] Next of kin or closest family member
- [ ] Nominated emergency contact (if you are not the primary contact)
- [ ] Executor or estate trustee
  Named in the will. They coordinate the legal and financial process — notify them early.
- [ ] Primary care physician or doctor
  They can issue the necessary medical documentation.
- [ ] Healthcare proxy or power of attorney holder
  If the person is incapacitated, this person has legal authority to make decisions.
- [ ] Employer or workplace
  A brief notification now is enough — details can follow.
- [ ] Any person or animal that depends on this person for daily care

3 — FIRST FEW DAYS: LOCATE IMPORTANT DOCUMENTS

These do not all need to be found immediately, but knowing where they are saves significant time.

> **BE SURE THEY KNOW CAN HELP**
> The 'Where to Find My Things' section of their Be Sure They Know plan lists every key document and exactly where it is kept — physical location, institution name, and any notes.

- [ ] Will or estate planning documents
  Check with the executor, an attorney, or the person's Be Sure They Know plan.
- [ ] Birth certificate
- [ ] Passport and government-issued photo ID
  Driver's licence, state ID, or equivalent.
- [ ] Life insurance policies
  Note the provider and policy number — claims often have a time window, so act promptly.
- [ ] Retirement account documents
  401(k), IRA, pension, or equivalent. The provider must be notified. Check for named beneficiaries on file.
- [ ] Bank account details, credit cards, and debit cards
- [ ] Health insurance card and Medicare or Medicaid card
- [ ] Property title, lease agreement, or mortgage documents
- [ ] Vehicle registration and title
- [ ] Advance directive, living will, or healthcare instructions document
- [ ] Power of attorney documents
  Financial and/or healthcare — these may be needed immediately if the person is incapacitated.
- [ ] Any trust deeds, business agreements, or partnership documents
- [ ] Social Security card or equivalent government identity number

4 — PRACTICAL STEPS: HOME AND PROPERTY

A few small actions now can prevent significant problems later.

- [ ] Photograph the home to document its current condition
- [ ] Secure the property — check all doors, windows, and locks
- [ ] Note everyone who holds a key, access code, or security alarm PIN
- [ ] Check the mailbox regularly for time-sensitive correspondence
  Legal notices, insurance renewals, and bill statements may still arrive by mail.
- [ ] Do not cancel accounts or subscriptions right away
  Some carry automatic insurance benefits or have claim processes that require the account to remain active.
- [ ] Identify any automatic payments or direct debits still running
- [ ] Check for any perishables, plants, or animals needing immediate attention
- [ ] Locate any physical safe, lockbox, or filing cabinet — and the key or combination
- [ ] Note any storage units, P.O. boxes, or off-site property

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5 — IN THE WEEKS FOLLOWING: ACCOUNTS AND ORGANIZATIONS

Spread these across several weeks. Prioritize financial accounts first — most others can wait.

BE SURE THEY KNOW CAN HELP
The 'My Life Logistics' section of their Be Sure They Know plan lists financial accounts, insurance providers, subscriptions, and services — a single reference for all of these notifications.

- [ ] Banks and financial institutions
  Request account freezes or transfers as directed by the executor. Bring official documentation.
- [ ] Retirement account providers
  401(k), IRA, pension administrator, or equivalent. Beneficiary nominations are held on file.
- [ ] Life, home, renters, auto, and health insurance providers
- [ ] Social Security Administration or equivalent government agency
  Report the death or incapacity to stop or redirect benefit payments.
- [ ] Veterans benefits office, if applicable
- [ ] Other government benefit agencies
  Disability, housing assistance, Medicaid, or any income support programs.
- [ ] Subscription services
  Streaming, gym memberships, clubs, software, magazines — cancel to stop ongoing charges.
- [ ] Electoral rolls and voter registration
  Notify the relevant state or local agency.
- [ ] Local property tax authority or municipality
- [ ] Professional associations, licenses, or trade memberships
- [ ] Loyalty and rewards programs with accumulated points
  Some programs allow transfer to a named beneficiary — check before the account closes.

6 — TAKE CARE OF YOURSELF

There is no right way to do this. Give yourself as much time as you need.

- [ ] You do not need to do everything at once
  The most urgent steps are at the top of this list. Everything else can wait days or even weeks.
- [ ] Accept offers of help — meals, errands, company, phone calls, paperwork
- [ ] Keep a simple written log of what has been done and what is still to do
- [ ] Ask a trusted person to help manage correspondence and calls
- [ ] Be patient with organizations — many processes take several weeks
- [ ] Reach out to a grief counsellor, therapist, or support group if you need to talk
  Ask your doctor for a referral, or search for grief support services in your area.
- [ ] Be kind to yourself — you are handling something genuinely hard

Notes

Record names, reference numbers, dates of calls, and anything important as you work through this checklist.