

If you do nothing else, start here.

A simple first step to protect the people you love, before a crisis.

The 2 a.m. test: If someone you love ended up in the hospital tonight, could your family find the documents, medications, contacts and passwords they need within an hour? This checklist helps you make sure the answer is yes.

Step 1: Access & Awareness

If nothing else, make sure this part exists.

WHERE ARE YOUR MOST IMPORTANT DOCUMENTS STORED TODAY?

Examples: safe, filing cabinet, attorney's office, digital vault, fireproof box

WHO KNOWS HOW TO ACCESS THEM IF YOU CANNOT?

List names and how they know where to look.

WHAT INFORMATION WOULD YOUR FAMILY STRUGGLE TO FIND QUICKLY?

Passwords, accounts, insurance, contacts, preferences

WHAT CONVERSATIONS STILL NEED TO HAPPEN?

Be honest. This matters.

Clarity today. Peace of mind tomorrow.

Step 2: Your Planning Checkpoint

Check off what's in place. Circle what still needs attention.

- | | |
|---|--|
| ☐ Legal documents reviewed | ☐ Trusted contacts informed |
| ☐ Financial accounts listed | ☐ Flexibility strategies understood |
| ☐ Insurance policies identified | ☐ Family conversations started |
| ☐ Medical preferences documented | |

Step 3: My Next Steps

You don't need the whole journey figured out. You need the next right step.

1 ONE THING I WILL DO THIS MONTH

2 ONE CONVERSATION I WILL START

3 ONE PERSON I WILL INCLUDE

MY TARGET DATE

MY ACCOUNTABILITY PERSON

Bonus: Set a family code word

Choose a word only your family knows. If anyone calls claiming to be a loved one in trouble and asking for money, ask for the word. **No word, no money.** One rehearsed rule stops the "grandchild in trouble" scam cold.

Planning is an act of love. You don't have to finish today. You just have to start.

Ready to go further?

The complete 17-page **Just-In-Case Plan™ Workbook** is waiting inside Silver Streak, along with the Fraud Awareness & Prevention Workbook, the Caregiver Planner, the Aging-in-Place Checklist and more. Membership is just \$10.

silverstreakhelp.com/join

Protect what matters. Prepare with purpose. Connect with confidence.

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