



THE 5-MINUTE FAMILY READINESS CHECK

If something happened tomorrow, could your family find it all?

Tick everything you could put your hands on today. Whatever's left isn't a failing — it's simply your next small step, and the whole reason we built this.

LEGAL DIRECTIVES

- ☐ Financial power of attorney
- ☐ Medical power of attorney (healthcare proxy)
- ☐ A current will or living trust
- ☐ Advance directive / living will
- ☐ HIPAA authorization for your family
- ☐ A named guardian for minor children
- ☐ A letter of instruction for your executor

WHERE IT ALL LIVES

- ☐ The originals' location is written down
- ☐ Safe or safe-deposit box location & key
- ☐ The right person knows where to look
- ☐ Keys & passwords reachable in an emergency

BENEFICIARIES & ACCOUNTS THAT SKIP THE WILL

- ☐ 401(k) / IRA beneficiary named and current
- ☐ Life insurance beneficiary up to date
- ☐ Pension survivor option chosen
- ☐ Payable-on-death (POD) on bank accounts
- ☐ Transfer-on-death (TOD) on brokerage
- ☐ HSA & annuity beneficiaries set
- ☐ Reviewed after any big life change marriage, divorce, birth, loss

THE PEOPLE WHO'LL CARRY IT OUT

- ☐ Executor named — and willing
- ☐ A backup executor in place
- ☐ Estate attorney & CPA on file
- ☐ A trusted contact at your bank

FOOD FOR THOUGHT

- ◆ *If your family had to take over tomorrow, where would they get stuck first?*
- ◆ *Does the person you named know they're named — and what you'd want?*
- ◆ *What's one thing only you know that no one else could ever find?*

Most loving, well-organized families have a few of these still open. There's no test here — only a head start. Life on Track gives every item above one calm home your family can reach in minutes, not weeks.

Keep all of this in one private place — **start free at lifeontrack.store** →