HOLLIS FOLIO
Family emergency & end-of-life organizers

Start here

This free Start Kit holds the five pages families reach for first. Fill it in with a pen or type into the fillable fields. It takes about 20 minutes.

- ☐ Fill in the Emergency Quick Sheet (page 2).
- ☐ List your key contacts and who to notify (page 3).
- ☐ Note where your legal documents are (page 4).
- ☐ Read the first-24-hours preview (page 5).
- ☐ Tell two people where you keep these pages.

Locator-only rules: never write passwords, PINs, full account or card numbers, Social Security or other ID numbers, safe combinations or recovery phrases. Write only where things are kept and who can reach them.

Person I told	Relationship	Date told

This is an organizing template, not legal, tax, financial or medical advice, and it is not a will, power of attorney, advance directive or any other legal document. Filling it in does not create, change or replace any legal document or beneficiary designation. Laws and procedures vary by state and country; consult a qualified attorney, tax professional or medical provider for advice about your situation. Never write passwords, PINs, full account numbers, Social Security or other ID numbers, or recovery phrases in this binder or spreadsheet. Record only where those items are kept and who can access them.

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Emergency Quick Sheet

> In an emergency, call 911 (or your local emergency number) first. Then use this page.

My full name

Date of birth

Preferred language

Home address

Call first: name	Relationship	Mobile	Other phone

Healthcare agent (name)

Agent's phone

Where my advance directive / healthcare documents are kept

Primary doctor (name and phone)

Allergies or health conditions, in my own words

People or pets at home	Who can step in	Their phone

Who holds a spare key	Phone

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Key contacts and who to notify

Notify when: 24h (first 24 hours), Wk (first week) or Later.

Role	Name	Phone	Email	Notify when 24h / Wk / Later
Executor / personal representative				
Attorney				
CPA / tax preparer				
Financial adviser				
Insurance agent				
Healthcare agent				
Primary doctor				
Employer / HR				
Clergy / faith community				
Neighbor with a key				

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Legal documents locator

Locator-only: write WHERE things are and WHO can reach them. Never write passwords, PINs, full account or card numbers, Social Security or other ID numbers, safe combinations or recovery phrases.

Document	Exists? Y/N	Date	Where the original is	Attorney holding it	Copies with
Will					
Trust(s)					
Financial power of attorney					
Advance directive / living will					
Healthcare power of attorney					
Guardianship nomination (minors)					
Property deed(s)					
Vehicle title(s)					
Life insurance policies					
Pre-need funeral contract					
Birth & marriage certificates					
Military discharge (DD-214)					

Safe deposit box: bank, and where the key is

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Preview: the first 24 hours

A short preview of the guide written for the person who opens the binder. The full version cites each public source.

If the death was unexpected, or you're not sure what has happened, call 911 (or your local emergency number).

- [ ] Take a moment. Unless there's an emergency, very little has to happen in the next hour.
- [ ] A death must be officially pronounced by someone with authority, such as a doctor or a hospice nurse. (National Institute on Aging)
- [ ] If the person was in hospice, call the hospice team. If not, talk with the doctor, medical examiner, local health department or a funeral home. (NIA)
- [ ] Check who depends on this person at home, and any pets.
- [ ] Look for written funeral wishes and any prepaid plan before choosing a funeral home. (FTC)
- [ ] You can ask funeral homes for prices by phone and get a written, itemized price list. (FTC Funeral Rule)
- [ ] The funeral director usually reports the death to Social Security. (SSA)

> The full binder adds the first week, first 30 days, 60+ pages and the Google Sheets tracker.

Get the full Family Emergency Binder: https://hollisfolio.gumroad.com/l/family-emergency-binder

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