FREE STARTER EDITION

THE 60-MINUTE FAMILY EMERGENCY BINDER

If your family could not find everything they need within an hour, you do not yet have clarity. This binder is how you get it.

STERLING BEAUMONT
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What this binder is

The Emergency Binder is the instruction manual for your financial life. It answers the questions your family will ask in the first days after a death, a serious illness or an accident: Who do we call first? What do we have, and where is it? How do we get in? What did you want?

The standard is simple. If your spouse, adult child or executor cannot find what they need within 60 minutes, you do not yet have clarity. Use the test below to see where you stand.

THE 60-MINUTE TEST

Hand this binder to your executor at 9:00. By 10:00 they should be able to answer:

- Which bank accounts do we have, and who holds them?
- Who is our financial adviser, and how do I reach them?
- Where is the will, and who is the executor?
- Which insurance policies exist, and who benefits?
- Who is named as beneficiary on each pension and retirement account?
- How do I get into the key accounts and devices?
- Where are the property deeds, titles and other original documents?
- Who should be told first?
- What are your wishes for medical care, and who speaks for you?
- Who are the trustees of any trusts, and how do I contact them?

How to complete it

- **Work in short sessions.** One section at a time is enough. Start with Section 1, then the document locations.
- **Type or print.** This is a fillable PDF. You can type into the boxes and save your own copy, or print it and write by hand.
- **Record where things are, not secrets.** Use last four digits for account numbers, and note where originals are kept.
- **Tell someone.** A binder nobody knows about is no use. Name who knows where it is.

KEEP IT SAFE

This binder will hold personal and financial information. If you complete it on a computer, save it in an encrypted or password-protected location, and do not email it. If you print it, keep it somewhere secure that your executor can reach. Review it at least once a year.

1 Emergency Contacts and Immediate Actions

Purpose: answer the question, "Who do I call first?"

1A. Family members

FULL NAME	RELATIONSHIP	PHONE	EMAIL

1B. Advisers and key contacts

ROLE	NAME AND FIRM	PHONE	EMAIL
Executor			
Backup executor			
Trustee (if any)			
Solicitor / attorney			
Accountant			
Financial adviser			
Insurance agent			
Primary doctor			
Employer / business partner			
Clergy or spiritual adviser			
Neighbour or friend with a key			

1C. The first 72 hours

A one-page guide your executor can follow. Edit it to suit your family and your country.

- [ ] Notify immediate family.
- [ ] Contact the executor and the solicitor or attorney.
- [ ] Obtain several certified copies of the death certificate.
- [ ] Notify the government pension or social-security agency.
- [ ] Notify the employer, if applicable.
- [ ] Contact life insurance companies.
- [ ] Secure the property and valuables.
- [ ] Review automatic payments and standing orders.
- [ ] Contact the financial adviser.
- [ ] Review funeral and burial wishes, if they have been written down.

2 Where Things Are

The most useful single page in the binder. Record where each original is kept, and who else knows.

DOCUMENT	WHERE IT IS KEPT	WHO ELSE KNOWS
Will		
Power of attorney		
Healthcare directive		
Trust documents		
Property deeds		
Insurance policies		
Pension / retirement statements		
Passport and ID		
Recent tax returns		
Business agreements		

A NOTE ON PASSWORDS

Do not write passwords in this binder. A password manager is the safest way to hold them. Record only where your executor can find the manager and how they would be given access, and keep that note somewhere secure. The Complete Edition includes a print-only section designed for this.

3 Your Next Steps

You have now answered the first and most urgent questions. To make this binder a complete picture, you would also record:

- Your **financial accounts and assets**: banks, investments, pensions, property, insurance and debts.
- Your **passwords and access**: how your family would get into accounts and devices, recorded securely.
- Your **estate planning documents**: what exists, when it was last reviewed, and who holds it.
- Your **tax and accounting information**.
- Your **healthcare and end-of-life wishes**.
- Your **personal wishes and legacy letter**: funeral preferences, sentimental items, and what you want your family to know.

THE COMPLETE EDITION

The Complete Edition covers all seven sections, with fillable tables for each, a print-only section for access information, and a review log. Find out more at sterlingbeaumont.com/pages/for-families.

GO DEEPER

The $84 Trillion Shift, the first book in The Beaumont Legacy Series, explains the Emergency Binder in full, with the reasoning behind each section. amazon.com/dp/B0HQXRJJG1

IMPORTANT INFORMATION

This binder is provided for educational and organisational purposes. It is not legal, tax, accounting, financial or medical advice, and completing it does not create a will, trust, power of attorney, healthcare directive or any other legal document. Laws differ by country, state and personal circumstance, so consult suitably qualified, licensed professionals in your own jurisdiction before relying on any entry. You are responsible for keeping the information accurate and secure. Sterling Beaumont and Infinity8 Publishing accept no liability for loss, misuse or unauthorised access to information you record, or for actions taken or not taken in reliance on this document.

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