



Document Storage & Sharing Plan

So the right people can find the right information—when it matters.

1) Where important documents are kept

Primary storage location (choose one):

- Home filing cabinet / binder (where exactly?): _____
- Safe / lockbox (where?): _____
- Safety deposit box (bank + box info): _____
- Digital folder (computer/cloud—where?): _____
- Other: _____

How documents are organized (brief):

2) Who has access (and how)

Key contacts who should know where to find documents:

Person	Relationship	What they can access	How they access it	Phone / email
_____	_____	<input type="checkbox"/> everything <input type="checkbox"/> selected items	<input type="checkbox"/> key <input type="checkbox"/> code <input type="checkbox"/> shared link <input type="checkbox"/> other	_____
_____	_____	<input type="checkbox"/> everything <input type="checkbox"/> selected items	<input type="checkbox"/> key <input type="checkbox"/> code <input type="checkbox"/> shared link <input type="checkbox"/> other	_____
_____	_____	<input type="checkbox"/> everything <input type="checkbox"/> selected items	<input type="checkbox"/> key <input type="checkbox"/> code <input type="checkbox"/> shared link <input type="checkbox"/> other	_____

Passwords / digital access (don't list passwords here—list where they are stored):

Password manager used (if any): _____

Master password / recovery key location: _____

Phone/computer unlock info stored at: _____

3) What's included (check what applies)

- Will & estate plan
- Enduring Power of Attorney
- Personal Directive
- Funeral preferences / pre-planning documents
- Insurance policies
- Banking / investment info (account list, not passwords)
- Property documents / lease / mortgage
- Key contacts list (lawyer, accountant, advisor)
- Digital accounts checklist
- Other: _____

4) Sharing rules (your preferences)

- Share now (so they can help if needed)
- Share only if I'm seriously ill / incapacitated
- Share only after death

Special instructions (optional):

- Who should be contacted first: _____
- Who should NOT have access: _____
- Any documents to keep private unless necessary: _____

5) Keep it current

Last updated (date): _____

Next review (suggested every 6–12 months): _____

Where this plan is stored: _____