THE

LEGACY BINDER

FAMILY PREPAREDNESS SYSTEM

Companion Resources

The seven printable resources from the book, for readers and audiobook listeners

1. The Legacy Binder Quick Start
2. The 14-Day Completion Plan
3. Minimum Viable Binder Checklist
4. The Legacy Binder Checklist Summary
5. Emergency Contacts & Trusted Helpers Card
6. Annual Review & Family Legacy Summit Page
7. The Break Glass in Case of Emergency Pages

Paul Brewer

THE LEGACY PROJECT 360

thelegacybinder.com

INSIDE THIS PACKAGE

Contents

> *You do not need to use every resource here. This is not homework. It is a menu. Take what helps, skip what does not, and come back later when life changes or new needs arise.*

1 **The Legacy Binder Quick Start** 3
The Legacy Binder Quick Start works when motivation is high and time is short.

2 **The 14-Day Completion Plan** 5
Fourteen days. Fourteen small steps. About five to ten minutes per day.

3 **Minimum Viable Binder Checklist** 10
If you only complete this checklist, your family will already have the most important information they need.

4 **The Legacy Binder Checklist Summary** 13
This is the master checklist.

5 **Emergency Contacts & Trusted Helpers Card** 17
Think of this as the "who do I call and what do they need to know" card.

6 **Annual Review & Family Legacy Summit Page** 19
This resource is designed to be used in two moments only: after major life changes and once per year, on purpose, not by accident.

7 **The Break Glass in Case of Emergency Pages** 23
The Break Glass Pages are simple, one page action guides designed for high stress moments when clear thinking is harder and time matters.

Every checkbox and write-in line in this PDF can be filled in on screen, or print the pages and fill them in by hand.

RESOURCE 1

The Legacy Binder Quick Start

Saturday Morning Setup

WHAT THIS IS

The Legacy Binder Quick Start works when motivation is high and time is short. You do not need to understand everything yet. You do not need perfect information. You need to start today. This one-page guide gets a functional Legacy Binder in place fast, without overthinking, overbuilding, or getting stuck in planning mode.

HOW THIS CONNECTS TO YOUR LEGACY

This checklist removes the biggest barrier to building your legacy: getting started. By focusing on minimum viable information today, you protect your family immediately and build momentum for the deeper work ahead.

The Legacy Binder Quick Start

Choose Your Format (pick one)

- [ ] Guided Legacy Binder Web App
- [ ] Print and fill by hand
- [ ] Fillable PDF
- [ ] Digital (Notion)

Create the Three Core Sections

- [ ] Key Family Information
- [ ] Financial Continuity
- [ ] Need to Know File

Fill in Minimum Viable Information

- [ ] Household members and basic contact info
- [ ] One emergency contact
- [ ] Medical allergies or conditions
- [ ] Main bank account
- [ ] One insurance policy
- [ ] One instruction page ("If something happens, start here")

Decide Where It Lives

- [ ] Physical binder location chosen
- [ ] Digital copy stored in cloud
- [ ] Location written inside binder
- [ ] Access method documented

Tell One Trusted Person

- [ ] Spouse or partner informed
- [ ] One backup trusted person informed
- [ ] They know where it is
- [ ] They know when to use it

You're Done (for now)

- [ ] Progress started
- [ ] Perfection avoided
- [ ] Momentum created

WHY THIS MATTERS

Complete this checklist and you are already ahead of most families. You have started, and everything else builds from this foundation.

RESOURCE 2

The 14-Day Completion Plan

WHAT THIS IS

Here's the truth about organizing your family's important information: you don't need to do it all at once. In fact, you shouldn't. Most people try to do everything in one weekend, get overwhelmed around hour three, and then don't touch it again for six months. That's not a strategy. That's a path to procrastination.

Instead, we're going to do this differently. Fourteen days. Fourteen small steps. About five to ten minutes per day. Not five hours in one sitting. Not a Saturday sacrifice. Just a few minutes each day, and you'll have a functional, protective foundation that your family can actually use.

HOW THIS CONNECTS TO YOUR LEGACY

This plan removes the biggest barrier to completion: overwhelm. By breaking your Legacy Binder into small, daily actions, you build consistency, momentum, and a finished product that actually protects your family.

The 14-Day Completion Plan

You can do these steps in order, or you can customize the sequence based on what makes sense for your life. The tool doesn't matter. The consistency does. Fourteen days from now, you'll have something real. Something your family can depend on. Something that actually protects them.

DAY 1 Primary Contacts

☐ CHECK WHEN COMPLETE

What to do: List your primary emergency contacts and one or two backup contacts.

Time: 5 minutes

Why it matters: If something happens to you, your family needs to know who to call first. Not their third cousin twice removed. The actual people.

How to do it: Write down your closest family members or friends. Their names. Their phone numbers. That's it. You're not writing a phone book. You're answering one question: "Who should we call?"

DAY 2 Medical Essentials

☐ CHECK WHEN COMPLETE

What to do: Record your primary physician's name and contact information.

Time: 5-10 minutes

Why it matters: Your family shouldn't have to guess who your doctor is or spend an hour searching your insurance paperwork.

How to do it: Find your insurance card (or look up your health provider online). Write down your doctor's name, clinic name, and phone number. If you don't have a primary doctor, write down the urgent care clinic nearest to you. Done.

DAY 3 Insurance Overview

☐ CHECK WHEN COMPLETE

What to do: List major insurance providers such as health, home, auto, or life.

Time: 5-10 minutes

Why it matters: Your family needs to know what's insured and who to contact if they need to file a claim.

How to do it: Grab your insurance cards (you probably have them on the kitchen counter or in a drawer). Write down the provider name and policy number for health, home, auto, or life insurance. You don't need policy details yet. Just the basics. You can expand this later if you want.

DAY 4 Financial Accounts Overview

☐ CHECK WHEN COMPLETE

What to do: List the names of your primary bank or financial institutions and brief instructions on how to access them.

Time: 5-10 minutes

Why it matters: If you're not there to pay the mortgage, your family shouldn't have to guess which bank holds your account or how to access it.

How to do it: Write down your bank name and last four digits of your account number. That's genuinely all you need. Your spouse doesn't need your password. She needs to know the account exists and which bank to call. You'll handle passwords separately on Day 5.

DAY 5 Password Access Instructions

☐ CHECK WHEN COMPLETE

What to do: Document where passwords are stored or how they can be accessed if needed.

Time: 5-10 minutes

Why it matters: Your family shouldn't be locked out of anything because you're the only person who knows the password.

How to do it: Write down where your passwords live. Are they in a password manager like 1Password or LastPass? Are they written down somewhere secure? On a piece of paper in a safe? Just tell your family where to find them. You're not putting passwords in this document. You're telling them where to look.

DAY 6 Legal Documents Location

☐ CHECK WHEN COMPLETE

What to do: Record where important legal documents are located such as wills, trusts, or powers of attorney.

Time: 5-10 minutes

Why it matters: Your family needs to know where these documents actually exist. Not read them today. Just know where they are.

How to do it: Write down: "Will is in the safe deposit box at First National Bank" or "Trust documents are in the filing cabinet under L" or "Everything is with our attorney, John Smith." That's it. Location, not contents.

DAY 7 Household Essentials

☐ CHECK WHEN COMPLETE

What to do: List utility providers or essential household services.

Time: 5-10 minutes

Why it matters: Life doesn't stop because something happened to you. Bills still need to get paid. Your family needs to know who to call.

How to do it: Write down your electric company, water company, internet provider, and trash service. Include the account number if you have it. Your family doesn't need to become an expert. They just need to know who to call if the power goes out and they need to report it.

DAY 8 Key Advisors

☐ CHECK WHEN COMPLETE

What to do: Record contact information for your accountant, attorney, or financial advisor if applicable.

Time: 5 minutes

Why it matters: Your family might need professional guidance. They should know who to call.

How to do it: If you have an accountant, attorney, or financial advisor, write down their name and phone number. If you don't have one, skip this day. It's not mandatory.

DAY 9 Digital Assets Overview

☐ CHECK WHEN COMPLETE

What to do: List your primary email provider and important digital platforms. Note how to access them.

Time: 5-10 minutes

Why it matters: More of your life lives online now than anywhere else. Bank accounts, medical records, bills, everything. Your family needs access to your digital life.

How to do it: Write down your main email address. Write down the names of platforms where you have accounts (Amazon, banking apps, social media, whatever matters). You're not writing passwords. You're just saying: "These places exist and here's how to access them (see Day 5)."

DAY 10 Family Guidance Note

☐ CHECK WHEN COMPLETE

What to do: Write one short note that helps your family know where to begin.

Time: 10-15 minutes

Why it matters: When something happens, your family is going to be overwhelmed and confused. A simple one-page note can guide them through the first 24 hours.

How to do it: Think of this as cliff notes. Not War and Peace. Think: "If something happens to me, here's what to do first." Example: "Call my employer at X number. Tell them I can't come in. Then call my doctor's office and let them know. Then call the insurance company. Then check this binder for the rest." One page. Five bullet points. Done.

DAY 11 Insurance Policy Detail

☐ CHECK WHEN COMPLETE

What to do: Add one policy number or document reference. This expands on Day 3.

Time: 5-10 minutes

Why it matters: Now that you've listed your insurance companies, add one policy number. Make it real.

How to do it: Pick one insurance policy (health, home, auto, life, whatever). Find the policy number. Write it down. You don't need all of them today. Just one. You're building momentum, not perfection.

DAY 12 Financial Access Note

☐ CHECK WHEN COMPLETE

What to do: Record one account detail or where information can be located. Think financial accounts other than bank accounts.

Time: 5-10 minutes

Why it matters: Bank accounts are important. But so are investment accounts, 401ks, cryptocurrency wallets, or anything else with money. Your family needs to know these exist.

How to do it: Pick one financial account (could be your brokerage account, 401k, savings account, whatever). Write down the company name and how to access it. Again, one is enough for today. You're building, not completing.

DAY 13 Identification Documents Location

☐ CHECK WHEN COMPLETE

What to do: Identify where important identification documents are stored such as passports, birth certificates, or Social Security records.

Time: 5 minutes

Why it matters: These documents matter for everything from claiming life insurance to proving identity. Your family needs to know where they are.

How to do it: Write down where these documents live. "Passports are in the safe" or "Birth certificates are in the filing cabinet" or "Everything is in the safe deposit box." Location is all you need.

DAY 14 Binder Review

☐ CHECK WHEN COMPLETE

What to do: Review what you have completed and identify one next item to add.

Time: 10 minutes

Why it matters: Day 14 isn't about adding something new. It's about noticing what you've done and feeling the momentum.

How to do it: Go back through what you've completed over the last two weeks. See how much you've actually done? You have a functional binder now. Your family has information they didn't have fourteen days ago. Then ask yourself: "What's one more thing I should add?" Insurance details? More accounts? Medical information? Pick one. Add it. Then close the binder and feel good about what you accomplished.

Optional: Use Habit Chains to Stay on Track

If you want to add an extra layer of accountability, download the Habit Chains app (available on iOS). You can create a "14-Day Legacy Binder" habit chain, set a daily reminder, and check off each day as you complete it. The app will send you a push notification at whatever time you choose, and you'll see your progress as you build.

It's optional. You don't need it. But if you like the structure and the reminder, it's there. It'll keep you consistent, and consistency is what actually gets this done.

Either way, fourteen days. Five to ten minutes. You've got this.

WHY THIS MATTERS

Fourteen short sessions. Approximately five to ten minutes each. No marathon organizing sessions. No need to locate every single document today. No pressure to be perfect. Just steady progress. In fourteen days, you'll have something real. Something that matters. Something that protects your family.

RESOURCE 3

Minimum Viable Binder Checklist

WHAT THIS IS

If you only complete this checklist, your family will already have the most important information they need. This is the foundation. You can always build from here. This checklist strips away everything that's nice to have and leaves only what's essential. It's designed to be completed in under an hour and to provide your family with immediate protection if something happens to you.

HOW THIS CONNECTS TO YOUR LEGACY

This checklist is your minimum viable legacy. It answers the core question: if I'm not here tomorrow, does my family know what they need to know? By completing this checklist, you create the essential foundation that every family needs.

Minimum Viable Binder Checklist

PART 1: Key Family Information (Minimum Viable)

This section answers: Who do we call and what do we need to know immediately?

- [ ] Primary Contact (Name + Phone)
- [ ] Backup Contact (Name + Phone)
- [ ] Out of Area Contact (Name + Phone)
- [ ] Household Members List (Names + DOB)
- [ ] Primary Doctor (Name + Phone)
- [ ] Known Medical Conditions (per person)
- [ ] Allergies (per person)
- [ ] Current Medications (basic list)
- [ ] School or Work Info (if applicable)
- [ ] Pets (basic care notes + vet name)
- [ ] One Trusted Neighbor or Friend

PART 2: Financial Information (Minimum Viable)

This section answers: How does the household keep functioning financially?

- [ ] Primary Bank Account (Institution + last 4 digits)
- [ ] Secondary Account (if applicable)
- [ ] Main Credit Card (Institution + last 4 digits)
- [ ] Mortgage or Rent Provider (Name + contact)
- [ ] One Utility Account (power, water, or gas)
- [ ] Insurance Policies (location only, not full detail)
  - Health
  - Home or Renters
  - Auto
  - Life
- [ ] Primary Income Source (where money comes from)
- [ ] Password Manager Noted (no passwords written)

PART 3: Need to Know Information (Minimum Viable)

This section answers: What does someone need to do if I'm not available?

- [ ] Binder Location Clearly Written
- [ ] Access Plan (Who is allowed to access and when)
- [ ] One Page of Instructions

  Example: "What to do first if something happens"
- [ ] Emergency Plan Basics
  - One meeting point
  - One backup meeting point
  - One evacuation route
- [ ] Grab List (Top Essentials Only)
  - Binder
  - Medications
  - Phones and chargers
  - Wallet / keys
- [ ] Location of Important Documents

  (do not over list, just where they are stored)
- [ ] Any Critical Notes: Anything your family would need to know immediately

Final Check

- [ ] Completed in under 60 minutes
- [ ] Information is simple and readable
- [ ] At least one trusted person has been told

SIMPLE TRUTH

You do not need a perfect binder. You need a binder that exists. This is enough to protect your family.

RESOURCE 4

The Legacy Binder Checklist Summary

WHAT THIS IS

This is the master checklist. Think of it as the table of contents for your entire Legacy Binder, expanded and practical. You do not need to complete every checkbox today. This resource exists to eliminate guesswork and make sure nothing important is forgotten over time. Use it as a working document, a progress tracker, and a reference you can return to whenever life changes.

HOW THIS CONNECTS TO YOUR LEGACY

This comprehensive checklist ensures your Legacy Binder is complete and organized. It becomes your roadmap for building, maintaining, and updating your family's preparedness over time.

Page 1: Key Family Information Checklist

This section creates a clear, at a glance snapshot of your household. If someone unfamiliar needed to understand your family quickly, this is where they would start.

Household Snapshot

- [ ] Full legal names of everyone in the household
- [ ] Nicknames or preferred names
- [ ] Dates of birth
- [ ] Home address
- [ ] Primary phone numbers
- [ ] Secondary phone numbers
- [ ] Email addresses
- [ ] Nearby family members or neighbors
- [ ] HOA or landlord contact information, if applicable

Emergency Contacts

PRIMARY EMERGENCY CONTACT

- [ ] Name
- [ ] Relationship
- [ ] Phone
- [ ] Email

SECONDARY EMERGENCY CONTACT

- [ ] Name
- [ ] Relationship
- [ ] Phone
- [ ] Email

OUT OF AREA EMERGENCY CONTACT

- [ ] Name
- [ ] Relationship
- [ ] Phone
- [ ] Email

Medical Basics

- [ ] Allergies (food, medication, environmental)
- [ ] Chronic conditions
- [ ] Current medications (name and dosage)
- [ ] Primary care physician
  - [ ] Name
  - [ ] Phone
- [ ] Preferred pharmacy
  - [ ] Name
  - [ ] Phone
- [ ] Health insurance provider
  - [ ] Member ID number

Kids and Pets

CHILDREN

- [ ] School or daycare name
- [ ] School address
- [ ] Teacher or administrator contact
- [ ] Pickup authorization notes
- [ ] Allergies or medical notes

PETS

- [ ] Pet names and species
- [ ] Vet name and contact
- [ ] Feeding instructions
- [ ] Medications
- [ ] Emergency boarding option

Trusted People

TRUSTED PERSON #1

- [ ] Name
- [ ] Relationship
- [ ] Phone
- [ ] What they are allowed to help with

TRUSTED PERSON #2

- [ ] Name
- [ ] Relationship
- [ ] Phone
- [ ] What they are allowed to help with

Page 2: Financial Continuity Checklist

This section ensures money continues to move and bills continue to get paid if you are unavailable. This is visibility and continuity, not account access.

Accounts

- [ ] Checking accounts
  - [ ] Bank name
  - [ ] Last four digits
  - [ ] Purpose
- [ ] Savings accounts
- [ ] Credit cards
- [ ] Investment accounts
- [ ] Retirement accounts
- [ ] Transfer on Death or beneficiary designations noted where applicable

Bills and Monthly Obligations

- [ ] Mortgage or rent
- [ ] Utilities
- [ ] Internet
- [ ] Phone plans
- [ ] Insurance premiums
- [ ] Subscriptions and memberships

FOR EACH:

- [ ] Provider
- [ ] Due date
- [ ] Average amount
- [ ] Auto pay or manual

Insurance

- [ ] Health insurance
- [ ] Auto insurance
- [ ] Home or renters insurance
- [ ] Life insurance
- [ ] Disability insurance

FOR EACH:

- [ ] Provider
- [ ] Policy number
- [ ] Agent name
- [ ] Agent phone

Income

- [ ] Employer information
- [ ] Pension or retirement income
- [ ] Government benefits
- [ ] Side or business income

Password Manager

- [ ] Password manager name
- [ ] Emergency access instructions documented
- [ ] Who is allowed access
- [ ] Where instructions are stored

Page 3: Need to Know File Checklist

This section answers the question, "What do I do now?" when someone is overwhelmed, grieving, or under pressure.

Legal Documents

- [ ] Will
- [ ] Trust documents
- [ ] Power of attorney
- [ ] Advance healthcare directive
- [ ] Birth certificates
- [ ] Marriage license
- [ ] Social Security cards
- [ ] Passports
- [ ] Location of originals documented

Instructions

- [ ] First steps checklist
- [ ] Who to call first
- [ ] Which bills matter most
- [ ] Business or work responsibilities
- [ ] Pet care instructions
- [ ] Home access instructions

Letters

- [ ] Letter to spouse or partner
- [ ] Letter to children
- [ ] Letters to others, if desired

Preferences

- [ ] End of life wishes
- [ ] Burial or cremation preference
- [ ] Service or memorial notes
- [ ] Music or readings
- [ ] Obituary notes

Access Notes

- [ ] Where the binder lives
- [ ] How to access digital copies
- [ ] Who has permission
- [ ] When it is appropriate to use

FINAL NOTE

This checklist is not a test. It is a guide. Each box you check removes confusion from someone you love. Fill it in once, update it when life changes, and let it quietly do its job.

RESOURCE 5

Emergency Contacts & Trusted Helpers Card

WHAT THIS IS

This is a single page, ultra portable reference designed to live in a wallet, glove box, phone notes app, or as a lock screen image. It is not a replacement for your Legacy Binder, it is the fast access backup for moments when the binder is not nearby and time matters.

Think of this as the "who do I call and what do they need to know" card. Simple, direct, and immediately useful under stress.

> **HOW THIS CONNECTS TO YOUR LEGACY**
>
> This card ensures critical information is accessible when you need it most. It bridges the gap between your detailed Legacy Binder and emergency moments when seconds matter.

HOW TO USE THIS CARD

Keep this page short on purpose. It should be readable in seconds, not minutes. If it feels crowded, remove details and point back to the binder instead. This card exists for speed, not completeness.

HOUSEHOLD IDENTIFICATION

- ☐ Full Name(s): _____
- ☐ Home Address: _____
- ☐ City, State, ZIP: _____
- ☐ Primary Phone Number: _____

EMERGENCY CONTACTS

(People to call immediately in an emergency)

Primary Contact

- ☐ Name: _____
- ☐ Relationship: _____
- ☐ Phone: _____

Secondary Contact

- ☐ Name: _____
- ☐ Relationship: _____
- ☐ Phone: _____

Out of Area Contact

- ☐ Name: _____
- ☐ Relationship: _____
- ☐ Phone: _____

TRUSTED HELPERS

(People authorized to assist, make decisions, or help your family)

- ☐ Name: _____
- ☐ Role or Permission (kids, pets, access, decisions): _____
- ☐ Phone: _____

- ☐ Name: _____
- ☐ Role or Permission: _____
- ☐ Phone: _____

MEDICAL ALERTS

(Only critical, life relevant information)

- ☐ Allergies: _____
- ☐ Major Medical Conditions: _____
- ☐ Required Medications: _____
- ☐ Medical Devices (insulin, oxygen, etc.): _____

NOTES

- ☐ Preferred Hospital or Doctor (if applicable): _____
- ☐ Special Instructions: _____

STORAGE REMINDERS

- ☐ Keep one copy in your wallet or phone
- ☐ Keep one copy in each vehicle
- ☐ Update when contacts or medical info changes

FINAL REMINDER

When stress is high, memory is unreliable. This card removes hesitation, confusion, and guessing, giving the people helping you exactly what they need, fast.

RESOURCE 6

Annual Review & Family Legacy Summit Page

WHAT THIS IS

This page exists so your Legacy Binder does not slowly turn into a very organized time capsule from three years ago. Life changes, kids grow, jobs shift, and plans evolve, which means your information needs a rhythm, not constant attention. This resource is designed to be used in two moments only: after major life changes and once per year, on purpose, not by accident.

For the annual review, we strongly recommend tying this to a time when your family is already together. While New Year's resolutions tend to fizzle out by mid January, the Christmas season is uniquely effective. Families are often together at some point in the weeks leading up to or just after Christmas, food is almost always involved, and people are already slowing down enough to talk.

HOW THIS CONNECTS TO YOUR LEGACY

This page creates a family rhythm around preparedness. By reviewing your binder together once a year, you reinforce clarity, confidence, and shared leadership across your household.

Annual Review Checklist

(Once per year is enough)

Use this checklist to walk through your Legacy Binder from front to back. If nothing has changed, that is a win. Confirm it and move on.

Key Family Information

- [ ] Household members still accurate
- [ ] Phone numbers and emails current
- [ ] Emergency contacts confirmed
- [ ] Trusted people list still valid
- [ ] School or childcare info updated
- [ ] Pet information still accurate

Medical Readiness

- [ ] New diagnoses noted
- [ ] Medications updated
- [ ] Allergies reviewed
- [ ] Doctors or pharmacies changed
- [ ] Insurance information current

Financial Continuity

- [ ] Bank accounts still accurate
- [ ] New accounts added
- [ ] Closed accounts removed
- [ ] Bills reviewed
- [ ] Insurance policies updated
- [ ] Beneficiaries reviewed
- [ ] Password manager still in use
- [ ] Emergency access instructions confirmed

Need to Know File

- [ ] Legal documents still accurate
- [ ] Will or trust reviewed if applicable
- [ ] Power of attorney still correct
- [ ] Instructions still relevant
- [ ] Letters updated if desired
- [ ] End of life preferences reviewed

Access Plan

- [ ] Binder location still correct
- [ ] Digital access still works
- [ ] Backup person still appropriate
- [ ] Spouse or partner knows where everything is

Go Bag Check Reminder

(Quick, not dramatic)

This is a check, not a shopping trip.

- [ ] Food not expired
- [ ] Medications current
- [ ] Batteries fresh
- [ ] Chargers present and working
- [ ] Clothing sizes still fit kids
- [ ] Flashlight works
- [ ] Paper map still legible
- [ ] Physical emergency info copies intact

If this takes more than fifteen minutes, something has gone off the rails.

Life Change Trigger List

(Review your binder any time one of these happens)

- [ ] Marriage or divorce
- [ ] Birth or adoption
- [ ] Death in the family
- [ ] Move to a new home
- [ ] Job change
- [ ] New employer benefits
- [ ] Major income change
- [ ] New medical diagnosis
- [ ] New medications
- [ ] Major surgery
- [ ] Change in caregivers
- [ ] Children starting or changing schools
- [ ] Kids learning to drive
- [ ] New vehicles
- [ ] Selling or buying property
- [ ] New business or side income
- [ ] Retirement
- [ ] Change in trusted people
- [ ] Significant change in emergency risks where you live

Any time life changes, information changes. That is your cue.

Family Legacy Summit Discussion Prompts

(This is a conversation, not a presentation)

Use as many or as few of these as make sense. Food is encouraged. PowerPoint is not.

Opening Prompts

- What went well for our family this year
- What felt stressful or chaotic
- What surprised us

Preparedness Check In

- Does everyone know where the Legacy Binder lives
- Do we all know who to call first in an emergency
- Do our meeting points still make sense
- Are there new risks we should think about

Roles and Responsibilities

- Who would help with kids if something happened
- Who would take pets
- Who lives close enough to help quickly
- Are these roles still realistic

Medical and Health

- Any new health needs we should document
- Any medications we need to update
- Any special considerations we should add

Financial and Life Admin

- Any new jobs or income changes
- Any new accounts or insurance
- Anything confusing that should be clarified

Values and Legacy

- What matters most to us as a family right now
- What traditions do we want to keep
- What do we want our kids to remember about how we handled responsibility
- Is there anything we want to add to the letters or notes section

Closing Prompt

- What is one small improvement we want to make this year

Notes

(Use this space for anything that does not fit neatly into a checkbox)

FINAL REMINDER

This page is not about perfection. It is about rhythm. Once a year, you slow down just enough to make sure your family stays aligned, informed, and confident. That consistency, more than anything else, is how legacy is built.

RESOURCE 7

The Break Glass in Case of Emergency Pages

WHAT THIS IS

The Break Glass Pages are simple, one page action guides designed for high stress moments when clear thinking is harder and time matters. They are not detailed manuals, they are fast reference sheets that tell your family exactly what to do if someone is hospitalized, if evacuation is required, where critical home shutoffs are located, and where essential access tools live. These pages contain no sensitive information, only direction and structure, and are meant to be printed and placed somewhere visible, like on the fridge or inside a cabinet door, so that when life interrupts the plan, your family does not have to guess.

HOW THIS CONNECTS TO YOUR LEGACY

These pages provide immediate action steps during emergencies. They remove confusion when clarity matters most.

BREAK GLASS PAGE 1

IF SOMEONE IS HOSPITALIZED

Purpose: If someone is unexpectedly hospitalized, follow these steps calmly and in order.

STEP 1 Immediate Actions

- [ ] Call 911 or confirm emergency services are engaged
- [ ] Bring phone and charger
- [ ] Bring wallet / ID / insurance card
- [ ] Bring current medication list (see Legacy Binder)

STEP 2 Notify Key People

Primary Contact: _____

Backup Contact: _____

Out of Area Contact: _____

- [ ] Notify immediate family
- [ ] Notify employer if needed
- [ ] Notify school or daycare if children are involved

Full contact details are located in the Legacy Binder, Emergency Contacts Section.

STEP 3 Children & Dependents

- [ ] Confirm who is picking up children
- [ ] Confirm who is caring for pets
- [ ] Confirm transportation plan

See Access Plan inside the Legacy Binder if clarification is needed.

STEP 4 What to Bring to Hospital

- [ ] Phone charger
- [ ] Basic toiletries (if extended stay likely)
- [ ] Medical Snapshot Sheet (from binder)
- [ ] List of medications

Stay calm. One step at a time. All detailed instructions are inside the Legacy Binder.

BREAK GLASS PAGE 2

IF WE MUST EVACUATE

Purpose: If evacuation is required, move quickly and follow this order.

STEP 1 People First

- [ ] All family members accounted for
- [ ] Elderly family assisted
- [ ] Pets secured

STEP 2 Grab List

- [ ] Legacy Binder or portable safe
- [ ] Medications
- [ ] Phones and chargers
- [ ] Wallet / purse / keys
- [ ] Go bags
- [ ] Firearms secured if time permits
- [ ] Essential pet supplies

Do not search for non essentials. If it slows you down, leave it.

STEP 3 Meeting Points

Primary Meeting Location: _____

Secondary Location: _____

Out of Area Contact: _____

STEP 4 Before Leaving (If Safe)

- [ ] Close windows
- [ ] Shut off gas if instructed
- [ ] Shut off propane if applicable
- [ ] Take photos of rooms if time allows

Detailed emergency framework is in the Legacy Binder. Fast. Calm. Clear. People over property.

BREAK GLASS PAGE 3

HOUSE SHUTOFF MAP & SYSTEMS

Purpose: Know where critical shutoffs are located before an emergency.

GAS SHUTOFF

Location: _____

Tool Required: _____

Tool Stored: _____

WATER MAIN

Location: _____

Tool Required: _____

ELECTRICAL MAIN PANEL

Location: _____

FIRE ALARM PANEL (If Applicable)

Location: _____

FIRE SPRINKLER SHUTOFF (If Applicable)

Location: _____

ADDITIONAL SYSTEMS

Propane Tank Shutoff: _____

Well Pump Shutoff: _____

Generator Transfer Switch: _____

Do not shut off utilities unless instructed by emergency services or necessary for safety. Full home documentation can be referenced in the Legacy Binder.

BREAK GLASS PAGE 4

KEY & CODE INDEX

Purpose: Quick reference to where access tools are located. Do NOT list sensitive codes here. Reference their secure location instead.

HOUSE KEYS

Primary Set Location: _____

Backup Set Location: _____

ALARM SYSTEM

Control Panel Location: _____

Code Stored In: _____

GARAGE DOOR OPENERS

Vehicle 1 Location: _____

Vehicle 2 Location: _____

Manual Release Location: _____

GATE / COMMUNITY ACCESS

Remote Location: _____

Code Stored In: _____

SAFE KEYS / COMBINATIONS

Physical Key Location: _____

Combination Stored In: _____

(Example: Password Manager, Sealed Envelope, etc.)

OTHER IMPORTANT ACCESS ITEMS

Mailbox Key: _____

Storage Unit Key: _____

Boat / RV Keys: _____

This page tells you where to look. Sensitive codes and passwords are stored securely as directed in the Access Plan.

The Web App Alternative

If you want these tools gathered into one guided experience instead of working through each resource manually, the Legacy Binder Web App was built for exactly that. It removes the need to flip between chapters and checklists by organizing everything in one place, with guided prompts and step-by-step instructions.

thelegacybinder.com

Get Your Free Legacy First 7 Starter Kit

Download the free Legacy First 7 Starter Kit, featuring the first seven essential steps to help you organize your family's most important information and begin building your Legacy Binder today.

www.thelegacybinder.com/legacyfirst7

Copyright © 2026 by The Legacy Project 360. All rights reserved.