

Try one practical handover

Family Affairs Update & Handover Pack

An optional companion to When I'm Gone

Opslumo / Free edition v1.1.0

A useful first pass

Choose one record

Pick a document that someone might need to find. Note its current location and who can explain the proper access process.

Name a practical next step

If something is missing, write a specific question and the person you will ask. A known location does not grant permission to use a record or account.

Try the overview

The next page is a complete reusable form from the free pack. Complete only what you want a trusted helper to see.

The complete free download

24-page fillable PDF and matching printable PDF; a six-sheet Excel workbook; the complete 17-section review; change and copy logs; conversation and letter tools; six editable text templates; and a three-page fictional worked example.

Free download: opslumo.com/book-companions/family-handover/

Support: meng@opslumo.com

This sample may be printed for your household. No passwords, PINs, recovery codes, full account numbers or identity numbers belong in these forms.

Your handover overview

Keep this short enough for a trusted helper to use first. A listed contact or wish does not grant permission to act.

Household / name

Updated on / next review

First contact and contact method

Backup contact and contact method

Where the latest organizer and record index are kept

First practical needs: people, pets, appointments or essential services

Who can explain formal authority and provider access requirements

What can wait / what should remain private for now

Share a checked copy with the people you choose. Store the fuller records separately and securely.

A small review you can finish

For each section, mark one: Reviewed (R), Action needed (A), or Not applicable (N). Leave all three blank if you have not reviewed it. Record details in the change log.

01 About me

☐ R ☐ A ☐ N

Check household details, preferred contact routes and record-name changes.

02 Health information

☐ R ☐ A ☐ N

Locate the latest care-team details and current health record. Confirm who can verify it.

03 People to contact

☐ R ☐ A ☐ N

Check first and backup contacts. Confirm they are still willing and reachable.

04 Care wishes to discuss

☐ R ☐ A ☐ N

Check conversation notes and the location of current formal care documents.

05 Dependents and pets

☐ R ☐ A ☐ N

Review daily routines, temporary help contacts and current care instructions.

06 Documents and access

☐ R ☐ A ☐ N

Confirm original and copy locations, current versions and authorized access steps.

This sample shows the first six headings. The complete pack covers all 17 sections, including financial records, work, beneficiaries, property, insurance, subscriptions, digital life, gathering wishes, memories and letters.

Use the book on its own or choose the optional companion at:
opslumo.com/book-companions/family-handover/