Family Affairs Update & Handover Pack

A practical companion to When I'm Gone

Make records easier to find, notice what has changed, and give a trusted helper a clear starting point. Use the book for your fuller story and wishes. Use this pack to keep the practical details current.

What you will make

- A short handover overview and current contact list
- A map to document locations and authorized access steps
- A review covering all 17 sections of the book
- A record of changes, conversations and copies shared

Opslumo
Free edition 1.1.0

Personal-household-use license. This is an organizer for records and conversations. It does not create legal documents, appoint a representative, or replace professional advice.

Start with one useful handover

1. Choose the current copy

Save a working copy with a clear date. If you use both paper and digital records, decide which copy is the master. Write its location on the overview.

2. Make a small first pass

Allow about 20 minutes for the overview, one contact and three document locations. Leave unknown details blank and give each gap a next action. Finish other sections in short sessions.

3. Agree on help

Ask the people you name whether they are willing to help. Discuss privacy and how an authorized person would follow the relevant provider process. Do not test access by sharing credentials.

4. Check that the copy works

For digital forms, enter a short test, save, close and reopen before entering more. Some preview apps do not save forms reliably. Keep entries brief and use extra copies of a page for overflow.

5. Revisit after change

Pick your own review date. Also revisit relevant pages after a move, family change, changed service, new document or changed care arrangement.

Find forms on pages 3-15 and 17-20. Letter starters are on page 16. A fictional worked example is on pages 21-23. Set your next review on page 24.

Keep passwords, PINs, recovery codes, seed phrases, safe combinations, full account numbers and identity numbers in their proper secure systems, never in these pages.

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.

People who can help

Confirm contact details directly. Note what each person is willing to do. Naming someone here does not appoint them to a formal role.

Contact 1

Name / relationship or professional role

Best contact method / backup route

Agreed help / date discussed

Privacy preferences / limits to respect

Contact 2

Name / relationship or professional role

Best contact method / backup route

Agreed help / date discussed

Privacy preferences / limits to respect

Contact 3

Name / relationship or professional role

Best contact method / backup route

Agreed help / date discussed

Privacy preferences / limits to respect

If contact details change, update the master copy and tell anyone who relies on the old version.

Permission and access map

A location is useful only when the next step is clear. Describe the official process and the person to ask. Do not write an unlock code or credential.

Access arrangement 1

Record, service or secure storage this relates to

Person / provider to contact

Where formal authority or instructions are kept

Permission or provider requirements to confirm / next step

Access arrangement 2

Record, service or secure storage this relates to

Person / provider to contact

Where formal authority or instructions are kept

Permission or provider requirements to confirm / next step

For a locked device, name the authorized support route and the location of secure instructions. Do not record a PIN or describe a pattern.

Document-location index - 1

Record where to find the current version. Use descriptive labels only. Keep full account numbers, identity numbers and security secrets out of this pack.

Record 01

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Record 02

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Record 03

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Need more rows? Print this page again or use the Locations worksheet. Keep each record label distinct.

Document-location index - 2

Record where to find the current version. Use descriptive labels only. Keep full account numbers, identity numbers and security secrets out of this pack.

Record 04

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Record 05

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Record 06

Document / related book section

Date or version of current record

Original and copy location

Contact / authorized access process

Need more rows? Print this page again or use the Locations worksheet. Keep each record label distinct.

Care and practical continuity

Use this for short-term practical information. Current care instructions and formal arrangements remain in their proper records.

Person or pet / routine to support

Agreed temporary-help contact

Daily essentials / where detailed current instructions are kept

Care team / school / veterinary contact

Appointments / transport / equipment location

Essential supplies / home tasks that need attention

Questions to confirm / person responsible / review date

Use a separate copy for each person or pet when routines differ. Tell the agreed helper where to find it.

Bills and service continuity

Identify what others depend on before discussing changes with a provider. These notes do not authorize a payment, cancellation or account change.

Service 1

Provider / service / people who rely on it

Billing record location / review date

Official contact / authorized person to ask

Next question or continuity action

Service 2

Provider / service / people who rely on it

Billing record location / review date

Official contact / authorized person to ask

Next question or continuity action

Service 3

Provider / service / people who rely on it

Billing record location / review date

Official contact / authorized person to ask

Next question or continuity action

Include memberships, giving commitments and subscriptions that need a conversation, as well as essential services.

Digital-life roadmap

Point to the inventory and official support process. Use public profile names or a short description. Keep private account details and secrets in secure storage.

Digital record 1

Service / device / what matters to preserve

Inventory or secure instruction location

Provider support / authorized contact

Settings or permissions to review / checked date

Digital record 2

Service / device / what matters to preserve

Inventory or secure instruction location

Provider support / authorized contact

Settings or permissions to review / checked date

Digital record 3

Service / device / what matters to preserve

Inventory or secure instruction location

Provider support / authorized contact

Settings or permissions to review / checked date

Ask providers about their current process. A named contact, a password or a wish in this pack is not a substitute for the authority they require.

Review every section

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.

07 Financial account index

☐ R ☐ A ☐ N

Check institution names, statement locations and official contact routes.

08 Business and work

☐ R ☐ A ☐ N

Review work commitments, business contacts and handover record locations.

09 Beneficiary record map

☐ R ☐ A ☐ N

Locate official beneficiary records and note any provider questions.

Review date / reviewer / change-log reference

Review every section

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.

10 Property and belongings

☐ R ☐ A ☐ N

Update property records, maintenance needs and belongings to discuss.

11 Insurance record map

☐ R ☐ A ☐ N

Locate current policies, renewal dates and official provider contacts.

12 Bills and subscriptions

☐ R ☐ A ☐ N

Review essential services, subscriptions, memberships and recurring commitments.

13 Digital life

☐ R ☐ A ☐ N

Check account inventory locations, legacy settings and official support routes.

14 Funeral and gathering wishes

☐ R ☐ A ☐ N

Review preferences, existing arrangements, flexibility and provider questions.

15 Ways to remember

☐ R ☐ A ☐ N

Update stories, traditions, keepsakes and any suggestions you want to leave.

16 Personal letters

☐ R ☐ A ☐ N

Review recipients, letter versions, storage locations and sharing preferences.

17 A few final words

☐ R ☐ A ☐ N

Revisit personal notes. Keep, revise or leave private as you choose.

Review date / reviewer / change-log reference

Change log

Write what changed and who needs the update. Keep superseded copies clearly marked so a helper can recognize the current one.

Change 1

Date / book section / record label

What changed / current copy location

Person to tell / date told

Next action / owner / target date

Change 2

Date / book section / record label

What changed / current copy location

Person to tell / date told

Next action / owner / target date

Change 3

Date / book section / record label

What changed / current copy location

Person to tell / date told

Next action / owner / target date

Change 4

Date / book section / record label

What changed / current copy location

Person to tell / date told

Next action / owner / target date

A conversation you can have

Choose a calm time and ask permission to discuss the topic. People may decline a role or a question. You can pause and return another day.

A simple opening

"I am making my records easier to find. Would you be comfortable talking about one practical way you could help? I would like us to agree on what fits and what should stay private."

Who / date / topic

What I would like to ask

What they agreed to / limits, questions or declined requests

Records or formal arrangements to confirm with the right person

Next step / owner

When we will check back

Close by repeating the agreed next step. Ask whether they want a copy of the relevant page.

Questions for a professional

Bring a focused list to the appropriate provider or qualified professional. Record the source and date of the response so you can check it later.

Professional / provider / contact route

Meeting or call date / related records

The situation and the exact question I need answered

Response / source document or follow-up information

Action I need to take / by when

Person helping / next review

Do not treat an unanswered question as a completed arrangement. Leave it visible in your review tracker.

Letters in your own voice

These are personal-message starters. They do not distribute property or change any formal document. Use, adapt or ignore them.

A memory to keep

Dear [name], when I think of us, I often return to [ordinary moment]. I remember [one small detail]. What it meant to me was [your own words]. I hope this reminds you [reassurance or appreciation].

A thank-you for practical help

Dear [name], thank you for being willing to talk about [kind of help]. I appreciate [specific care or effort]. We agreed [short practical next step]. Please tell me if your circumstances change; we can make another plan.

A note for an ordinary day

Dear [name], I hope an ordinary day finds you with room for [something they enjoy]. One thing I have always admired in you is [quality and example]. You can keep the traditions that fit your life and change the ones that do not.

Before sharing: check the recipient, remove anything you want kept private, add a date, and decide where the current version belongs. The separate editable text file includes six complete starting templates.

A memory or personal message

This page is yours to write, leave unfinished or keep private. The separate text templates can help you begin.

To / how I address this person

Date / version

My words

Where the current letter is kept

Sharing preference / person to ask

A thank-you or reassurance

This page is yours to write, leave unfinished or keep private. The separate text templates can help you begin.

To / how I address this person

Date / version

My words

Where the current letter is kept

Sharing preference / person to ask

More of my own words

This page is yours to write, leave unfinished or keep private. The separate text templates can help you begin.

To / how I address this person

Date / version

My words

Where the current letter is kept

Sharing preference / person to ask

Keep copies current

Choose a master copy, note who holds an extract, and record which older versions need to be replaced or marked as superseded.

Master copy location / version date

Person maintaining it / next review

Copy or extract 1

Recipient / pages or records shared

Date shared / version / safe delivery method

Older copy to replace / confirmation received

Copy or extract 2

Recipient / pages or records shared

Date shared / version / safe delivery method

Older copy to replace / confirmation received

Copy or extract 3

Recipient / pages or records shared

Date shared / version / safe delivery method

Older copy to replace / confirmation received

Share only what the recipient needs. Review access to shared folders as well as paper copies.

Worked example: a first handover

Every name, record and arrangement on pages 21-23 is invented. These pages show how the parts connect; they are not instructions for your household.

Mara Ellis prepares for an extended trip

Mara wants her sister Jo to know where to start if Mara cannot handle routine calls. Jo agrees to help with household coordination. They do not assume this gives Jo access to accounts or authority to make formal decisions.

Her handover overview

Current copy

Home folder / Travel handover / reviewed 09/01/26. Jo has a short extract.

First practical need

Cat Miso needs the routine kept in the kitchen care folder. Jo has agreed to check the supplies with Mara before departure.

First contact

Jo Ellis, sister. Preferred contact route is in Mara's private address book; no contact details are printed in this example.

What needs confirmation

Mara will ask the service provider which permissions are needed before Jo makes any account-related request.

One entry in the document-location index

Record: Home service agreement

Section: Bills and subscriptions

Current copy: Household folder / Services / current agreement

Contact and access: Provider's official support route; Mara will confirm requirements

Next action: Ask about permitted contact arrangements before the trip

Worked example: all 17 sections

Mara reviews every heading, including sections that need no change. "Action needed" stays visible until the underlying question or update is resolved.

Book section	Review status	Short note
01 About me	Reviewed	Contact route unchanged
02 Health information	Reviewed	Current record location confirmed
03 People to contact	Action needed	Check backup contact
04 Care wishes to discuss	Reviewed	Current document location noted
05 Dependents and pets	Action needed	Check Miso's supply list
06 Documents and access	Reviewed	Master folder location checked
07 Financial account index	Reviewed	Institution index unchanged
08 Business and work	Not applicable	No business/work handover for this review
09 Beneficiary record map	Reviewed	Official record location unchanged
10 Property and belongings	Reviewed	Home maintenance notes current
11 Insurance record map	Reviewed	Policy folder checked
12 Bills and subscriptions	Action needed	Confirm provider contact requirements
13 Digital life	Action needed	Review photo-sharing settings
14 Funeral and gathering wishes	Reviewed	Preferences unchanged
15 Ways to remember	Reviewed	Recipe folder updated
16 Personal letters	Reviewed	Current letter version dated
17 A few final words	Reviewed	Private notes left private

Review date: 09/01/26. Four sections have an open action. One is not applicable to this review. The checklist records the review; it does not verify legal authority.

Worked example: close the loop

A change is recorded

On 09/02/26 Mara moves the current home service agreement into the Household / Services folder. In the change log she names the record, gives its new location and identifies Jo as the person who needs the update.

A conversation settles the scope

Mara asks, "Could you help locate the folder and contact the provider if something needs attention?" Jo agrees to locate records and make an initial enquiry. They leave any formal access or decision authority for the provider and appropriate professional to confirm.

The notification is checked

Mara sends Jo only the revised extract, asks her to replace the older one and records 09/03/26 as the date Jo confirms receipt. "Shared" means the current information was delivered; it does not mean the provider has approved access.

One action can remain open

The provider question has not yet been answered. Mara keeps Bills and subscriptions marked Action needed, with herself as owner and 09/07/26 as the target date. Updating the file location does not silently close that separate question.

A short handover test

Jo can name the current folder, find the care instructions and explain which provider to ask. She does not log in, use a password or attempt a transaction. Mara corrects one unclear folder label and sets her next review date.

Try the same sequence with one real record: locate it, name the next person to ask, check which copy is current, and leave any unresolved action visible.

Choose your next review

A useful organizer can begin small and remain unfinished. Keep the next action clear, and review the parts that have changed.

My next planned review date

Who I will invite to help, if anyone

One record or conversation I will finish next

Changes that should trigger an earlier review in my household

Where I will keep the current copy and any private supporting records

About this companion

When I'm Gone remains usable on its own. This optional pack adds reusable update and handover tools. It is licensed for one household, including sharing completed extracts with that household's trusted helpers and advisers. See License.txt for the full use terms.

Opslumo / Free edition v1.1.0
Support: meng@opslumo.com
Book companions: opslumo.com/book-companions/