A FREE GUIDE FROM OAKS FINANCIAL SERVICES

If Something Happens to Me

The one page your family would need first — before they need it.

Before you start

This isn't a will, and it isn't legal advice. It's the practical, everyday information your family would be searching for in the first confusing hours and days — where things are, and who to call.

Fill in what you can today. Update it once a year, or whenever something changes. An incomplete page still beats no page.

HOW TO USE THIS

- Keep it somewhere your family can actually find it, not just somewhere safe.
- Tell at least one person where it is.
- Revisit it once a year — a stale page is almost as good as no page.

ONE

Who to Call

Financial advisor

Attorney

Accountant / tax preparer

Insurance agent

TWO

Where Things Are

Will and other estate documents

Life insurance policies

Bank and investment accounts

Safe deposit box or home safe

THREE

What They'd Need to Know

Password manager or how to access accounts

Outstanding debts or loans

Recurring bills that need attention

Anyone who depends on you financially

FOUR

What You Want Them to Do First

Who should they call first, before anyone else

Anything urgent needing immediate attention (a business, dependents, pets)

Anything you want handled a specific way

Once you've filled this in

This page won't cover everything, and it doesn't need to. It just needs to get your family through the first few days without guessing.

Make updating it a habit, not a one-time task — a job change, a new account, or a new advisor is a good reminder to check it again.

IF THIS MATTERED TO YOU

This page covers the practical logistics. The Legacy Vault covers what a page like this can't — your voice, your values, the things you'd actually want to say. The two work well together.

Learn more at oaksfs.com/legacy-vault