

The care plan kit

Everything only you know, written down, so the people who help you never have to guess.

- 1 Fill in what you can. Leave blanks for later. A half-finished plan beats none.
- 2 Write down where things are kept, not passwords or account numbers.
- 3 Keep it somewhere the right people can find it, and tell them where.
- 4 Look it over once a year, and after any big change.

A plan in a drawer is just paper. It works when someone has it, and the authority to act on it. Our plain guides on wills, trusts, powers of attorney and care plans are at kinlyplan.com/learn.

What's inside

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|---------------------|-----------------------------|
| 1. My wishes | 4. My health |
| 2. My people | 5. My money and papers |
| 3. My home and pets | 6. My letter of instruction |

My wishes

How you want to be looked after if you're sick, hurt or can't speak for yourself.

If I can't live on my own, I'd want to...

Things that comfort me (music, faith, routines, people)

Things I don't want

If I'm in the hospital, I'd want these people to visit

Anything else people should know

My people

Who to call first, in order, and who you've named in your documents.

Who to call first

Name	Relationship	Phone	What they should know

Who I've named

Role	First choice	Backup
Medical power of attorney		
Financial power of attorney		
Executor		
Successor trustee		

People who help me

	Name	Phone
Lawyer		
Accountant		
Financial advisor		
Faith or community leader		

My home and pets

The small things that keep life running while you're away.

Who has a key

Alarm or door codes are kept

Trash and recycling day

Mail and packages

Plants and what they need

Neighbors or helpers who know the house

Pet's name and kind

Food, how much, and when

Walks and routines

Vet and medicines

Who looks after them

My health

So a doctor or a helper can get the basics fast.

Primary doctor and phone

Allergies

Specialists

Conditions

Pharmacy

My medicine list is kept

Medicare and other health cards are kept

My advance directive and medical power of attorney are kept

Who has a copy of them

My money and papers

Where things are, so bills keep getting paid and nothing is lost.

Bills that come every month

Company	What it's for	Paid how (autopay, check, card)

Where my papers are

- ☐ Will:
- ☐ Trust:
- ☐ Powers of attorney:
- ☐ Deeds and car titles:
- ☐ List of accounts (not the numbers):
- ☐ Phone and computer passcodes (who knows them):

My letter of instruction

Not a legal document. Just what you want the people you love to know.

Who should get the things that matter to me, and why

My funeral or memorial wishes

What I'd want people to remember
