

YOUR ESSENTIAL PLANNING TIMELINE

A simple place to start, and a clear guide for the people who love you.

You don't need to figure out everything today. You need to start. This timeline breaks the parts of planning that actually matter into pieces you can do this week, this month, this year. Check them off. Write yourself a note where you need one. Come back to it when life changes, because it will.

The second half of this guide isn't for you. It's for the people who love you - the ones who will need to know what to do first if something happens to you tomorrow, and what to do in the weeks after you're gone. Print it. Give it to them. Don't make them guess.

How to use this page

- A blank box means it's yours to check off.
- ESSENTIAL marks what shouldn't wait.
- A time estimate tells you what you're signing up for.
- The notes column is for names, account numbers, anything you'd otherwise forget.

A brief note: requirements for wills, healthcare directives, and power of attorney vary by state and country. This timeline will get you moving — for anything complex, it's worth a conversation with a local attorney.

PART ONE

FOR YOU

Four timeframes. Start with today's list - it takes less than an hour and it's the difference between someone knowing what to do and someone guessing.

Start Today

30-60 minutes

TASK	TIME		NOTES
Choose an emergency contact.	5 min	ESSENTIAL	
Write down your medications.	10 min	ESSENTIAL	
List your allergies.	5 min		
Tell one trusted person where your important documents are kept.	10 min	ESSENTIAL	

This Month

The paperwork that protects the people you'd leave behind

TASK	TIME		NOTES
Create or update a will.	2-3 hrs	ESSENTIAL	
Review your beneficiaries.	20 min	ESSENTIAL	
Make a password list.	30 min		
Organize your financial accounts.	1 hr		
Record your insurance information.	20 min		
Create an emergency folder.	30 min	ESSENTIAL	

Within 3 Months

The harder conversations, and the documents that back them up

	TASK	TIME		NOTES
	Write down your healthcare wishes.	1 hr	ESSENTIAL	
	Create a durable power of attorney.	1-2 hrs	ESSENTIAL	
	Discuss your wishes with family.	varies	ESSENTIAL	
	Organize your digital accounts.	1 hr		
	Review your subscriptions.	20 min		

This Year

Once it's done, it isn't done forever — plan to revisit it

	TASK	TIME		NOTES
	Review everything you've put in place.	1 hr		
	Update after any major life change.	varies		
	Check your insurance coverage.	20 min		
	Refresh your passwords.	30 min		
	Back up your important files.	30 min		

PART TWO

FOR THE PEOPLE WHO LOVE YOU

Print this part on its own. Put it somewhere they'll find it – not somewhere safe, somewhere obvious. In a crisis, nobody wants to search.

When an Emergency Happens

Keep this page simple. This is not the time for notes.

TASK

	Call emergency services.
	Bring the medication list.
	Notify immediate family.
	Locate medical documents.
	Secure the home.

AFTER SOMEONE DIES

Within the First 24 Hours

TASK

	Obtain a legal pronouncement of death.	ESSENTIAL
	Contact close family.	ESSENTIAL
	Contact the funeral home.	ESSENTIAL
	Secure the home and pets.	ESSENTIAL
	Gather identification and important documents.	

Within the First Week

TASK

	Request multiple certified copies of the death certificate.	ESSENTIAL
	Notify the employer.	
	Contact insurance companies.	ESSENTIAL
	Inform banks.	ESSENTIAL
	Pause unnecessary subscriptions.	
	Begin notifying government agencies.	

Within the First Month

TASK

	Meet with an attorney, if needed.	
	Start probate, if applicable.	
	Transfer utilities.	
	Close online accounts.	
	Organize personal belongings.	

Within 6 to 12 Months

TASK

	File final tax returns.	ESSENTIAL
	Complete estate settlement.	ESSENTIAL
	Close remaining accounts.	
	Review your own planning documents.	

KEY CONTACTS

These are the names that get asked for first. Fill them in now, while you have the time to get them right.

WHO	NAME	PHONE/EMAIL
Emergency contact		
Doctor		
Attorney		
Financial advisor / accountant		
Insurance agent		
Funeral home (if chosen)		
Executor		
Clergy or officiant (if any)		

If this timeline is the start, the Timeless Guide is where it becomes complete – every document, every account, every wish, gathered in one place for the people who'll need it.

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