

Family Preparedness Checklist

Find one strength and one practical next step.

People

- ☐ Trusted people know how I would like help to be offered.
- ☐ Family, professional and emergency contacts are current.

Documents

- ☐ I know where my current will is stored.
- ☐ My Powers of Attorney are current.
- ☐ Insurance, housing and account information is organized securely.

Safeguards

- ☐ We pause and check urgent money requests.
- ☐ Account access, alerts and trusted contacts have been reviewed.
- ☐ We know how to raise concerns respectfully.

My next review date

My first priority

One Conversation. One Document. One Next Step.

Choose three small commitments that are clear enough to begin this week.

1. One Conversation

Who do I need to talk with? What first question will I ask?

2. One Document

What needs to be created, reviewed or located?

3. One Next Step

What will I do in the next seven days?

My date to begin

Support Contacts

Keep this page where you and the people you trust can find it. Confirm personal contacts regularly.

If someone is in immediate danger, call 9-1-1.

211 Ontario

Community, social, health and government services; phone help is available 24/7 in 150+ languages.

Dial or text 2-1-1 • 211ontario.ca

Seniors Safety Line

Free, confidential, 24/7 support for older adults experiencing or at risk of abuse.

1-866-299-1011 • ontario.ca/elderabuse

Canadian Anti-Fraud Centre

Report fraud or cybercrime and learn what to do after an incident.

1-888-495-8501 • antifraudcentre.ca

9-8-8 Suicide Crisis Helpline

Call or text any time if you are struggling, thinking about suicide, or worried about someone else.

Call or text 9-8-8 • 988.ca

My trusted circle

Trusted family member or friend Name: _____	Phone: _____
Primary health-care provider Name: _____	Phone: _____
Lawyer or legal adviser Name: _____	Phone: _____
Financial professional Name: _____	Phone: _____

Privacy reminder: do not write passwords, PINs or full account numbers in this workbook.

This resource is for education and planning. It does not replace legal, financial or medical advice. Contacts verified September 2026.

wjwellness.com/money-family-peace-of-mind

