COOPERATIVE MEMORIAL SOCIETY

Document Storage & Sharing Plan

So the right people can find the right information—when it matters.

1) Where important documents are kept

Primary storage location (choose one):

☐ Home filing cabinet / binder (where exactly?): _____
☐ Safe / lockbox (where?): _____
☐ Safety deposit box (bank + box info): _____
☐ Digital folder (computer/cloud—where?): _____
☐ Other: _____

How documents are organized (brief):

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2) Who has access (and how)

Key contacts who should know where to find documents:

Person	Relationship	What they can access	How they access it	Phone / email
_____	_____	☐ everything ☐ selected items	☐ key ☐ code ☐ shared link ☐ other	_____
_____	_____	☐ everything ☐ selected items	☐ key ☐ code ☐ shared link ☐ other	_____
_____	_____	☐ everything ☐ selected items	☐ key ☐ code ☐ shared link ☐ other	_____

Passwords / digital access (don't list passwords here—list where they are stored):

Password manager used (if any): _____
Master password / recovery key location: _____
Phone/computer unlock info stored at: _____

3) What's included (check what applies)

☐ Will & estate plan
☐ Enduring Power of Attorney
☐ Personal Directive
☐ Funeral preferences / pre-planning documents
☐ Insurance policies
☐ Banking / investment info (account list, not passwords)
☐ Property documents / lease / mortgage
☐ Key contacts list (lawyer, accountant, advisor)
☐ Digital accounts checklist
☐ Other: _____

4) Sharing rules (your preferences)

☐ Share now (so they can help if needed)
☐ Share only if I'm seriously ill / incapacitated
☐ Share only after death

Special instructions (optional):

- Who should be contacted first: _____
- Who should NOT have access: _____
- Any documents to keep private unless necessary: _____

5) Keep it current

Last updated (date): _____
Next review (suggested every 6–12 months): _____

Where this plan is stored: _____