

Beyond Legal Documents: A Workflow Map

If not you, the who, what, how, when, and why

Legal documents like wills, powers of attorney, and health proxies provide authority, but they don't provide instructions. Create systems so someone can actually step in and help if you're not available.



1 Legal Foundation (Baseline) Creates authority but not instructions

- Power of Attorney, Will, Health Proxy
- HIPAA / Release forms signed
- Trusted contacts identified



2 Who: Support Team Defined

- Family roles (who checks in, who manages records)
- Professionals (organizer, bookkeeper, attorney, financial advisor)
- Backups in case the primary helper is unavailable and oversight for transparency



3 Who Does What

- Medical & insurance tracking (current conditions, claims, prescriptions, renewals)
- Financial: Bill paying + banking (auto-pay, checklist, or delegated access)
- Household maintenance schedule (utilities, repairs, vendors)
- Financial oversight (investment monitoring, advisor communication)



4 How: Instructions & Guides

- Red file/If I'm unavailable, binder or shared drive
- Logical, indexed file system (digital + paper)
- Emergency instructions (hospitalization, unexpected travel, incapacity)
- Access to your equipment and accounts (passwords, bills, subscriptions)
- Calendar of recurring responsibilities (due dates, appointments)
- Step-by-step instructions for routine tasks



5 Maintenance

- Quarterly or annual review of documents & systems. (Tax time is best)
- Update files when accounts or contacts change