



Family Knowledge Transfer Handbook

Family Continuity Planner

Prepare your family with the knowledge they need when it matters most. Fill this template by hand and store it in a safe, accessible place.

Handbook Details — Please complete before storing

Prepared For _____

Date Completed _____

Stored At _____

Emergency
Contact _____

🛡️ This is a physical document. Store it in a secure location known to your trusted family members. Consider keeping a copy in a fireproof safe or with your lawyer.

SECTION 0

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SECTION 1

Personal Information

Core identity details for family reference

Photo
(Optional)

FULL NAME

DATE OF BIRTH

BLOOD GROUP

OCCUPATION

PAN (OPTIONAL)

AADHAAR — LAST 4 DIGITS ONLY

PASSPORT — LAST 4 DIGITS ONLY

PRIMARY MOBILE

PRIMARY EMAIL

RESIDENTIAL ADDRESS

EMERGENCY MEDICAL NOTES — ALLERGIES, MEDICATIONS, CONDITIONS

SECTION 2

Family Directory

Contact details for immediate family members

FAMILY MEMBER 1

FULL NAME

RELATIONSHIP

DATE OF BIRTH

MOBILE

EMAIL

ADDRESS

SPECIAL NOTES

FAMILY MEMBER 2

FULL NAME

RELATIONSHIP

DATE OF BIRTH

MOBILE

EMAIL

ADDRESS

SPECIAL NOTES

FAMILY MEMBER 3

FULL NAME

RELATIONSHIP

DATE OF BIRTH	MOBILE
EMAIL	
ADDRESS	
SPECIAL NOTES	

Family Directory — continued

FAMILY MEMBER 1

FULL NAME

RELATIONSHIP

DATE OF BIRTH

MOBILE

EMAIL

ADDRESS

SPECIAL NOTES

FAMILY MEMBER 2

FULL NAME

RELATIONSHIP

DATE OF BIRTH

MOBILE

EMAIL

ADDRESS

SPECIAL NOTES

SECTION 3

Emergency Contacts

Key people to reach in times of emergency — Doctor, Lawyer, CA, Advisor, Relative, Friend

EMERGENCY CONTACT 1

CONTACT NAME

CATEGORY (DOCTOR / LAWYER / CA / ADVISOR / OTHER)

RELATIONSHIP

PRIMARY PHONE

ALTERNATE PHONE

OFFICE / CLINIC ADDRESS

NOTES — WHEN TO CONTACT, SPECIAL INSTRUCTIONS

EMERGENCY CONTACT 2

CONTACT NAME

CATEGORY (DOCTOR / LAWYER / CA / ADVISOR / OTHER)

RELATIONSHIP

PRIMARY PHONE

ALTERNATE PHONE

OFFICE / CLINIC ADDRESS

NOTES — WHEN TO CONTACT, SPECIAL INSTRUCTIONS

EMERGENCY CONTACT 3

CONTACT NAME

CATEGORY (DOCTOR / LAWYER / CA / ADVISOR / OTHER)

RELATIONSHIP

PRIMARY PHONE

ALTERNATE PHONE

OFFICE / CLINIC ADDRESS

NOTES — WHEN TO CONTACT, SPECIAL INSTRUCTIONS

EMERGENCY CONTACT 4

CONTACT NAME

CATEGORY (DOCTOR / LAWYER / CA / ADVISOR / OTHER)

RELATIONSHIP

PRIMARY PHONE

ALTERNATE PHONE

OFFICE / CLINIC ADDRESS

NOTES — WHEN TO CONTACT, SPECIAL INSTRUCTIONS

SECTION 4

Financial Accounts

Bank and financial institution records for continuity

 **Important:** Do NOT write account numbers here. Record only the institution name, purpose, and where documents are stored.

ACCOUNT 1

INSTITUTION NAME	ACCOUNT PURPOSE (E.G. SALARY, SAVINGS, EMERGENCY)
ACCOUNT TYPE	PRIMARY HOLDER
JOINT HOLDER (IF ANY)	NOMINEE ADDED (YES / NO / PENDING)
DOCUMENT / PASSBOOK LOCATION	
NOTES	

ACCOUNT 2

INSTITUTION NAME	ACCOUNT PURPOSE (E.G. SALARY, SAVINGS, EMERGENCY)
ACCOUNT TYPE	PRIMARY HOLDER
JOINT HOLDER (IF ANY)	NOMINEE ADDED (YES / NO / PENDING)
DOCUMENT / PASSBOOK LOCATION	
NOTES	

ACCOUNT 3

INSTITUTION NAME

ACCOUNT PURPOSE (E.G. SALARY, SAVINGS,
EMERGENCY)

ACCOUNT TYPE

PRIMARY HOLDER

JOINT HOLDER (IF ANY)

NOMINEE ADDED (YES / NO / PENDING)

DOCUMENT / PASSBOOK LOCATION

NOTES

SECTION 5

Investments

Investment portfolio and platform registry — Mutual Funds, Stocks, FD, PPF, EPF, NPS, Gold, Bonds

INVESTMENT 1

PLATFORM / INSTITUTION NAME

INVESTMENT CATEGORY

NOMINEE STATUS (YES / NO / PENDING)

CONTACT PERSON / RELATIONSHIP MANAGER

DOCUMENT / STATEMENT LOCATION

NOTES — ACCESS INSTRUCTIONS FOR FAMILY

INVESTMENT 2

PLATFORM / INSTITUTION NAME

INVESTMENT CATEGORY

NOMINEE STATUS (YES / NO / PENDING)

CONTACT PERSON / RELATIONSHIP MANAGER

DOCUMENT / STATEMENT LOCATION

NOTES — ACCESS INSTRUCTIONS FOR FAMILY

INVESTMENT 3

PLATFORM / INSTITUTION NAME

INVESTMENT CATEGORY

NOMINEE STATUS (YES / NO / PENDING)

CONTACT PERSON / RELATIONSHIP MANAGER

DOCUMENT / STATEMENT LOCATION

NOTES — ACCESS INSTRUCTIONS FOR FAMILY

INVESTMENT 4

PLATFORM / INSTITUTION NAME

INVESTMENT CATEGORY

NOMINEE STATUS (YES / NO / PENDING)

CONTACT PERSON / RELATIONSHIP MANAGER

DOCUMENT / STATEMENT LOCATION

NOTES — ACCESS INSTRUCTIONS FOR FAMILY

SECTION 6

Insurance Registry

All insurance policies — Life, Health, Vehicle, Property, Travel, Business

INSURANCE POLICY 1

INSURANCE TYPE

PROVIDER / COMPANY

POLICY PURPOSE / WHO IS COVERED

RENEWAL MONTH

NOMINEE AVAILABLE (YES / NO)

AGENT / CONTACT INFORMATION

POLICY DOCUMENT LOCATION

NOTES — CLAIM PROCESS, EXCLUSIONS

INSURANCE POLICY 2

INSURANCE TYPE

PROVIDER / COMPANY

POLICY PURPOSE / WHO IS COVERED

RENEWAL MONTH

NOMINEE AVAILABLE (YES / NO)

AGENT / CONTACT INFORMATION

POLICY DOCUMENT LOCATION

NOTES — CLAIM PROCESS, EXCLUSIONS

INSURANCE POLICY 3

INSURANCE TYPE

PROVIDER / COMPANY

POLICY PURPOSE / WHO IS COVERED

RENEWAL MONTH

NOMINEE AVAILABLE (YES / NO)

AGENT / CONTACT INFORMATION

POLICY DOCUMENT LOCATION

NOTES — CLAIM PROCESS, EXCLUSIONS

INSURANCE POLICY 4

INSURANCE TYPE

PROVIDER / COMPANY

POLICY PURPOSE / WHO IS COVERED

RENEWAL MONTH

NOMINEE AVAILABLE (YES / NO)

AGENT / CONTACT INFORMATION

POLICY DOCUMENT LOCATION

NOTES — CLAIM PROCESS, EXCLUSIONS

SECTION 7

Property Register

Real estate and land holdings — Residential, Commercial, Land, Agricultural

PROPERTY 1

PROPERTY TYPE

LOCATION / ADDRESS

OWNERSHIP STRUCTURE (SOLE / JOINT / INHERITED / UNDER LOAN)

DOCUMENT STORAGE LOCATION

PROPERTY MANAGER / CARETAKER

TENANT INFORMATION (IF RENTED)

NOTES

PROPERTY 2

PROPERTY TYPE

LOCATION / ADDRESS

OWNERSHIP STRUCTURE (SOLE / JOINT / INHERITED / UNDER LOAN)

DOCUMENT STORAGE LOCATION

PROPERTY MANAGER / CARETAKER

TENANT INFORMATION (IF RENTED)

NOTES

PROPERTY 3

PROPERTY TYPE

LOCATION / ADDRESS

OWNERSHIP STRUCTURE (SOLE / JOINT / INHERITED / UNDER LOAN)

DOCUMENT STORAGE LOCATION

PROPERTY MANAGER / CARETAKER	TENANT INFORMATION (IF RENTED)
NOTES	

SECTION 8

Loans & Liabilities

Outstanding loans and financial obligations

LOAN / LIABILITY 1

LOAN TYPE (HOME / PERSONAL / VEHICLE / EDUCATION / BUSINESS / OTHER)

INSTITUTION / LENDER

OUTSTANDING STATUS (ACTIVE / CLOSED / PARTIALLY PAID)

EMI DUE DATE (E.G. 5TH OF EVERY MONTH)

FAMILY MEMBER AWARE (YES / NO)

DOCUMENT LOCATION

NOTES

LOAN / LIABILITY 2

LOAN TYPE (HOME / PERSONAL / VEHICLE / EDUCATION / BUSINESS / OTHER)

INSTITUTION / LENDER

OUTSTANDING STATUS (ACTIVE / CLOSED / PARTIALLY PAID)

EMI DUE DATE (E.G. 5TH OF EVERY MONTH)

FAMILY MEMBER AWARE (YES / NO)

DOCUMENT LOCATION

NOTES

LOAN / LIABILITY 3

LOAN TYPE (HOME / PERSONAL / VEHICLE / EDUCATION / BUSINESS / OTHER)

INSTITUTION / LENDER

OUTSTANDING STATUS (ACTIVE / CLOSED /
PARTIALLY PAID)

EMI DUE DATE (E.G. 5TH OF EVERY MONTH)

FAMILY MEMBER AWARE (YES / NO)

DOCUMENT LOCATION

NOTES

LOAN / LIABILITY 4

LOAN TYPE (HOME / PERSONAL / VEHICLE /
EDUCATION / BUSINESS / OTHER)

INSTITUTION / LENDER

OUTSTANDING STATUS (ACTIVE / CLOSED /
PARTIALLY PAID)

EMI DUE DATE (E.G. 5TH OF EVERY MONTH)

FAMILY MEMBER AWARE (YES / NO)

DOCUMENT LOCATION

NOTES

SECTION 9

Monthly Operations

Regular household and financial activities — Bills, SIPs, EMI, School Fees, Subscriptions

ACTIVITY NAME	FREQUENCY	RESPONSIBLE PERSON	PAYMENT METHOD	INSTRUCTIONS / NOTES

SECTION 10

Tax Information

Income tax filing details for family reference

TAX FILING METHOD (CA / SELF / EMPLOYER)

CA / TAX CONSULTANT NAME

CA CONTACT (PHONE / EMAIL)

TYPICAL FILING TIMELINE (E.G. JULY 31)

REQUIRED DOCUMENTS — FORM 16, INVESTMENT PROOFS, RENT RECEIPTS, BANK STATEMENTS, ETC.

ADDITIONAL NOTES — ADVANCE TAX, SPECIAL SITUATIONS, GST, BUSINESS INCOME

SECTION 11

Vehicles

Vehicle registry, insurance, and service details

VEHICLE 1

VEHICLE TYPE (CAR / MOTORCYCLE / TRUCK / OTHER)

REGISTRATION NUMBER

INSURANCE RENEWAL MONTH

PUC RENEWAL MONTH

AUTHORIZED SERVICE CENTER (NAME & PHONE)

EMERGENCY / ROADSIDE CONTACT

DOCUMENT LOCATION (RC, INSURANCE, ETC.)

NOTES — LOAN DETAILS, SPECIAL MAINTENANCE

VEHICLE 2

VEHICLE TYPE (CAR / MOTORCYCLE / TRUCK / OTHER)

REGISTRATION NUMBER

INSURANCE RENEWAL MONTH

PUC RENEWAL MONTH

AUTHORIZED SERVICE CENTER (NAME & PHONE)

EMERGENCY / ROADSIDE CONTACT

DOCUMENT LOCATION (RC, INSURANCE, ETC.)

NOTES — LOAN DETAILS, SPECIAL MAINTENANCE

VEHICLE 3

VEHICLE TYPE (CAR / MOTORCYCLE / TRUCK / OTHER)	REGISTRATION NUMBER
INSURANCE RENEWAL MONTH	PUC RENEWAL MONTH
AUTHORIZED SERVICE CENTER (NAME & PHONE)	EMERGENCY / ROADSIDE CONTACT
DOCUMENT LOCATION (RC, INSURANCE, ETC.)	
NOTES — LOAN DETAILS, SPECIAL MAINTENANCE	

SECTION 12

Utilities & Services

Household utility accounts — Electricity, Gas, Internet, Mobile, Water, DTH, Security

SERVICE NAME	PROVIDER / COMPANY	CUSTOMER / ACCOUNT ID	BILLING FREQUENCY	CONTACT INFO	NOTES

SECTION 13

Digital Assets

Online accounts and digital asset registry

 **Do not write passwords here.** Only record WHERE your credentials are stored — not the credentials themselves.

ACCOUNT / ASSET	CATEGORY	OWNER	RECOVERY CONTACT	LOCATION OF CREDENTIALS (NOT THE PASSWORD)

SECTION 14

Important Documents

Registry of all critical family documents and their locations

DOCUMENT NAME	DOCUMENT TYPE	PHYSICAL LOCATION	DIGITAL COPY	NOTES
Aadhaar Card				
PAN Card				
Passport				
Voter ID				
Driving Licence				
Birth Certificate				
Marriage Certificate				
Will / Testament				
Property Papers				
Insurance Policies				
Bank Passbooks				
Investment Statements				
Educational Certificates				
Other				

SECTION 15

Family Preferences

Personal preferences, traditions, and values your family should know

PREFERRED DOCTOR

PREFERRED HOSPITAL

PREFERRED SCHOOL (FOR CHILDREN)

RELIGIOUS PREFERENCES

CHARITABLE PREFERENCES / CAUSES

FAMILY TRADITIONS — IMPORTANT RITUALS, CUSTOMS, PRACTICES TO PRESERVE

IMPORTANT ANNUAL EVENTS — BIRTHDAYS, ANNIVERSARIES, FESTIVALS TO REMEMBER

PERSONAL MESSAGE TO FAMILY — YOUR GUIDANCE, VALUES, AND HOPES FOR THEM

SPECIAL NOTES

SECTION 16

Emergency Instructions

Step-by-step guidance for your family during a crisis

WHAT SHOULD THE FAMILY DO FIRST IN AN EMERGENCY?

WHO SHOULD BE CONTACTED IMMEDIATELY? (NAME, RELATIONSHIP, PHONE)

WHERE ARE IMPORTANT DOCUMENTS STORED?

CRITICAL INFORMATION THE FAMILY MUST KNOW IMMEDIATELY

SECTION 17

Hospitalization Plan

A guide for your family in case of hospitalization

IMMEDIATE CONTACTS TO NOTIFY (NAME, RELATIONSHIP, PHONE)

INSURANCE PROCEDURE — POLICY DETAILS, TPA NAME, CASHLESS PROCESS

EMPLOYER NOTIFICATION — HR CONTACT, LEAVE POLICY, COMPANY BENEFITS

MEDICAL HISTORY — CONDITIONS, ALLERGIES, MEDICATIONS, BLOOD TYPE, SURGERIES

FINANCIAL CONTINUITY — EMERGENCY FUNDS ACCESS, AUTO-PAID BILLS, POWER OF ATTORNEY

SECTION 18

End-of-Life Guidance

A compassionate guide to help your family navigate a difficult time

🕒 Fill in as much or as little as you are comfortable with. This is personal guidance, not legal advice. Store this page with your important documents.

IMPORTANT PEOPLE TO INFORM

DOCUMENT LOCATIONS — WILL, BANK NOMINATIONS, PROPERTY PAPERS, LAWYER CONTACT

INSURANCE CLAIMS GUIDANCE — LIFE POLICIES, NOMINEE DETAILS, CLAIM PROCESS

PERSONAL MESSAGE TO FAMILY

LEGACY NOTES — CHARITABLE WISHES, VALUES TO PASS ON

