RECORDS • CONTINUITY • LEGACY

PRESERVE

Protect what matters for tomorrow

01 LEARN

02 PRACTICE

03 ACT

04 REVIEW

A practical guide to turning ideas into measurable action.

PRESERVE

Protect what you build

Leave with a basic records inventory, a backup plan, and one continuity conversation.

WORKED EXAMPLE

Example: A household creates an inventory of key documents, stores copies securely, tells a trusted person how to access emergency instructions, and reviews the list twice a year.

YOUR FOUR-STEP METHOD

1 | Inventory important records

Identify IDs, insurance, employment, education, property, business, and emergency contact records.

2 | Store copies securely

Use secure physical storage and protected digital backups. Avoid keeping sensitive information in an unprotected shared folder.

3 | Make a continuity plan

List key contacts, recurring obligations, and steps a trusted person should take during an emergency.

4 | Preserve stories and community knowledge

Record family stories, organizational history, or neighborhood milestones with consent and secure storage.

Official starting point

https://www.ready.gov/plan

PRESERVE | Your action worksheet

Write your plan

Documents I need to locate or update:

_____

Where secure copies will be stored:

_____

Trusted contact and what they should know:

_____

One story or record worth preserving:

_____

Next review date:

_____

PRESERVE | 30-day progress tracker

■ Week 1: inventory records

Evidence / notes: _____

■ Week 2: create secure copies

Evidence / notes: _____

■ Week 3: discuss continuity with a trusted person

Evidence / notes: _____

■ Week 4: test access and schedule a review

Evidence / notes: _____

Decision at day 30

Continue / revise / change direction (circle one). Why?

_____

Next action and date: _____

This guide is educational, not individualized legal, tax, financial, or professional advice. Confirm program requirements with the provider.

PRESERVE | Deeper learning

Use this companion section after the core action worksheet. It turns your initial goal into an informed decision.

Decision tool: prioritize records

High priority: identification, insurance, emergency contacts and active obligations. Next: property, business and education records. Finally: photos, stories and other legacy materials. Choose secure storage appropriate to sensitivity.

Practice: emergency continuity

Imagine your phone is lost during a storm. How would you reach a trusted contact, access insurance information, and identify essential obligations? Write the first three actions and test the plan.

Avoid a common mistake

Do not place passwords, identity numbers and account details in a broadly shared folder. Use strong access controls and update permissions when circumstances change.

Evidence to keep

Document inventory, backup date, trusted contact confirmation and next review date.

PRESERVE | Apply what you learned

Use complete sentences and actual dates. Keep this page as your record of progress.

What are two realistic options and the tradeoffs of each?

_____

_____

What information do I still need to verify?

_____

_____

What could prevent success and what is my backup plan?

_____

_____

Who can help, and what exactly will I ask?

_____

_____

What evidence will show progress in 30 days?

_____

_____

Decision and next action

I will _____ by _____. I will review it on _____.

YOUR ACTION PLAN

Complete one row at a time. Use real dates and specific evidence.

ACTION / DECISION	NEXT STEP + OWNER	DEADLINE / EVIDENCE
01		
02		
03		
04		

30-DAY OUTCOME

REVIEW DATE: _____ **NEXT ACTION:** _____