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New Year Challenge Workbook

31 Questions for Reflection, Planning, and Peace of Mind

Use this workbook as a guided checklist and reflection tool. You don’t need to complete everything at once. Simply pause, reflect, and jot down notes as you work through each question.

Many people also find this workbook helpful as a starting point for conversations with a legal or financial advisor, helping organize thoughts and identify questions they may want to discuss.

Topic 1: Access, Awareness & Digital Life

As you review the questions below, use the notes section to capture thoughts, actions, or conversations you may want to revisit.

1. If something unexpected happened tomorrow, would the people you trust know where to find your important documents, passwords, and key information?

2. Is there at least one trusted person who could access your phone if needed?

3. Would someone know how to reach your emergency contacts even if your phone was locked?

4. Have you reviewed your phone's emergency settings (Emergency Contacts, Medical ID)?

5. Have you securely stored instructions for accessing important digital accounts and passwords?

6. Would someone know how to access essential information on your phone if you were unavailable?

7. Have you shown a trusted person where important information is stored?

Notes:

Topic 2: Family, Pets & Personal Wishes

As you review the questions below, use the notes section to capture thoughts, actions, or conversations you may want to revisit.

8. If you have children or dependents, is there clarity around who would care for them?

9. Have you shared routines or care instructions for dependents?

10. Would someone know who should care for your pets?

11. Are pet care instructions and vet information written down?

12. Have you shared important medical information or preferences?

13. Have you communicated your personal wishes or values?

14. Is there someone who understands what matters most to you?

Notes:

Topic 3: Financial Awareness & Continuity

As you review the questions below, use the notes section to capture thoughts, actions, or conversations you may want to revisit.

15. Would someone know what financial accounts exist?

16. Are key financial contacts written down and accessible?

17. Would someone know which bills are time-sensitive?

18. Are insurance policies easy to locate?

19. Have beneficiaries been reviewed and updated?

20. Is there clarity around recurring expenses?

21. Does any important financial information exist in only in your memory?

Notes:

Topic 4: Action, Organization & Preparedness

As you review the questions below, use the notes section to capture thoughts, actions, or conversations you may want to revisit.

22. Have you gathered important documents into one secure place?

23. Have documents been labeled so others can understand them?

24. Have you written a simple list of where key information is stored?

25. Have you chosen a trusted person who knows where this information is?

26. Have you shared access instructions with that person?

27. Have you reviewed your phone's emergency settings for accuracy?

28. Are digital accounts stored securely and accessible if needed?

29. Have you updated important contact information?

30. Have you taken one small step this month to reduce stress for loved ones?

31. Do you feel confident someone could step in without confusion?

Notes:

Disclaimer

New Day Notary is not a law firm and does not provide legal or financial advice.