Organizing a Parent's Important Information

An afternoon plan for gathering a parent's key information, with a one-page index of where everything is, so the family can find it in an emergency.

The goal isn't to copy every account number. It's to know where things are and who can act. Do this with your parent, at their pace. Some of it is private, and that's their call.

An afternoon plan

- ☐ **Start with the emergency basics:** conditions, allergies, medicines, doctors and emergency contacts on one sheet for the refrigerator.
- ☐ **Find the legal papers:** will, power of attorney, health care proxy, living will, and any POLST or DNR. Note where the originals are.
- ☐ **List the people:** doctors, pharmacy, lawyer, financial advisor, insurance agents, and the neighbor with a key.
- ☐ **Note where things are kept:** bank and retirement accounts, insurance policies, the deed and car title, tax returns.
- ☐ **Decide who can act:** who is named in each document, and whether banks and doctors have those papers on file.
- ☐ **Keep passwords out of it:** note that a password manager or a sealed envelope exists and where, not the passwords themselves.
- ☐ **Choose one place to keep it all,** and tell two people where it is.

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Where things are: a one-page index

What	Where it's kept	Who to call
Will		
Power of attorney (financial)		
Health care proxy and living will		
POLST or DNR form		
Medicare and insurance cards		
Medicine list		
Bank accounts		
Retirement and pensions		
Life insurance		
Long-term care insurance		
House deed or lease		
Car title and insurance		
Tax returns		
Safe deposit box and key		
Spare house key		
Password manager or envelope		

Who can act

Role	Name	Phone
Financial power of attorney		
Health care agent or proxy		
Executor named in the will		
Lawyer		

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> **Keep it safe**
> Never write full Social Security numbers, account numbers or passwords on a sheet that stays in the house. Write where they are kept instead.

Your parent leads, when they can. Most decisions are theirs to make, and health questions belong with their doctor. This checklist helps your family organize and take the next step together.

The Family Caregiver Quick-Start: 1. Can No Longer Live Alone: What to Do First · 2. Signs a Parent Needs More Help · 3. Preparing for a Family Care Meeting · 4. Choosing a Home Care Agency · 5. Preparing for a Home Care Assessment · 6. What to Bring to a Medical Appointment · 7. Organizing a Parent's Important Information. All at AgingAtHomeSupport.com/caregiver-quick-start/

For your parent's complete planner, What My Family Needs to Know is at AgingAtHomeSupport.com/book/#needs-to-know; for the family's ongoing records, see The Family Care Binder.

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