

The Family File Box Checklist

Everything your family will need, gathered in one place before the crisis.

Parent's name:

Started on:

Across three seasons of caregiving, I learned that love is practical as well as emotional. Sit down with your parent at the kitchen table, with a cup of coffee, and fill this in together, one section at a time. Ask about the stories behind the papers. Let it be a conversation, not an interrogation. That box is not a filing system. It is a lifeline. — *Becky*

Write down WHERE each item is kept. Never write account numbers or passwords on this sheet.

HEALTHCARE DOCUMENTS

Have it · Where it's kept

Medical first. These must be reachable in any health emergency.

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|---|----------------------|
| ☐ Advance Healthcare Directive or Living Will
Their wishes about treatment if they can't speak for themselves. | <input type="text"/> |
| ☐ Healthcare Power of Attorney
Names who makes medical decisions. Separate from the financial POA. | <input type="text"/> |
| ☐ HIPAA Authorization Form
Without it, doctors cannot legally talk with you. | <input type="text"/> |
| ☐ POLST Form
A physician's order that emergency responders must follow. Ask their doctor. | <input type="text"/> |
| ☐ Current medication list with dosages
Update it whenever a prescription changes. | <input type="text"/> |

FINANCIAL DOCUMENTS

Have it · Where it's kept

Financial second. Note what's missing so it can be handled while there's time.

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|--|----------------------|
| ☐ Will (original)
Plus the attorney who prepared it, and whether probate is likely. | <input type="text"/> |
| ☐ Trust documents
The full agreement and any amendments, if there is a trust. | <input type="text"/> |
| ☐ Durable Power of Attorney for Finances
Names who manages money if they can't. Must be signed while competent. | <input type="text"/> |
| ☐ Beneficiary designation records
Retirement accounts and life insurance. These override the will. | <input type="text"/> |
| ☐ Financial inventory
Banks, investments, retirement accounts, loans and debts. Kept in the box. | <input type="text"/> |
| ☐ Life insurance policies
Company, policy, beneficiary and how to file a claim. | <input type="text"/> |
| ☐ Long-term care insurance
Company, policy and how to file a claim, if applicable. | <input type="text"/> |

☐ Tax returns The last two years.	
☐ Property documents Deed, car titles, mortgage, property tax records, home and auto insurance.	
☐ Safe deposit box Location of the box and of the key.	

OTHER IMPORTANT DOCUMENTS	Have it · Where it's kept
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Everything else, as you go.

☐ Personal identification Birth certificate, Social Security card, passport or ID, marriage license, DD-214, divorce decrees.	
☐ Advisor contact list Attorney, financial advisor, CPA, doctors and specialists, pastor or spiritual advisor.	
☐ Digital asset inventory Online accounts and the password manager's master password. Store it in the box, not the cloud.	
☐ Funeral or memorial preferences Their wishes, and any prepaid funeral contracts.	

ONE LAST STEP: TELL SOMEONE

A perfectly organized box that nobody can find in a crisis serves no one. Tell at least two family members.

The box is kept:			
Who knows (1):		Who knows (2):	
Still missing:			

NOTES FOR THE FAMILY

The stories behind the papers, wishes you heard at the table, questions to ask next time.