A FAMILY ORGANIZER

Caring for a Parent

A shared organizer for the everyday work of looking after Mom or Dad — appointments, medications, costs, and the hundred small things that shouldn't live in one person's head.

THIS BINDER IS FOR

(parent's name)

KEPT BY

Print it and write in it, or fill it in on a tablet — either way, it works the way your family does.

PLEASE READ

This binder is an organizational record-keeping tool. It is not legal, medical, financial, or tax advice, and it is not a substitute for guidance from licensed professionals. Always confirm medical information with your parent's care team and legal or financial matters with a qualified professional.

SECTION 7 — IMPORTANT DOCUMENTS

Where Things Are

One index for where every important document lives — so any of you can lay a hand on it in minutes, day or night. Record locations only: never the documents themselves, and never passwords or full account numbers.

DOCUMENT	WHERE THE ORIGINAL IS KEPT	COPIES WITH	LAST SEEN
Will			
Living will / advance directive			
Healthcare proxy / medical power of attorney			
Financial power of attorney			
Insurance cards & policies			
Medicare card			
Birth certificate			
Passport / state ID			
Property deed			
Bank accounts — where the list is kept			
Passwords — kept in a password manager			
Safe-deposit box (bank & branch)			

If a document on this list doesn't exist yet, only a qualified professional in your parent's state can advise on creating one — this index simply records where things are kept. Do not record passwords or full account numbers here; note only where they are kept (for example, "in the family password manager").

Organizational record-keeping tool — not legal, medical, financial, or tax advice.

SECTION 4 — APPOINTMENTS & VISITS

Doctor-Visit Log

One page per visit. Fill in the top box before you go; write down what was said while it's fresh. Record what the provider said — this page keeps the family's notes, it doesn't interpret them.

DATE

PROVIDER

WHO WENT ALONG

VISIT TYPE

☐ Routine ☐ Follow-up ☐ New concern ☐ Annual

WHAT WE WANTED TO COVER

WHAT WAS DISCUSSED

WHAT THE PROVIDER SAID TO DO NEXT

QUESTIONS LEFT FOR NEXT TIME

FOLLOW-UP NEEDED? ☐ Yes ☐ No

BOOKED FOR

Organizational record-keeping tool — not legal, medical, financial, or tax advice.