

Parent Information Sheet

A simple starting point so your family knows who to call, what exists, and where important information can be found.

Important: This sheet is a guide to where information is kept. For security, avoid writing passwords, PINs, or other sensitive access codes here.

1. Basic Information

Parent's full name

Home address

Phone / email

Emergency contact

2. Important Documents

Write where each item is kept, not necessarily the details inside it.

Will

Power of attorney / mandate

Health-care instructions

Marriage / divorce documents

Property documents

3. People to Contact

Lawyer / notary

Financial advisor

Accountant / tax preparer

Insurance contact

Other important contact

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4. Financial & Insurance Information

Record where the information can be found. You do not need to list balances or passwords.

Banking information

**Investment / retirement
accounts**

Pension information

Life insurance

Other insurance policies

5. Home & Regular Commitments

Mortgage / rent information

Property tax information

Utilities

Regular bills / subscriptions

Vehicle information

6. Digital Information

**Where digital account list is
kept**

**Where password manager /
instructions are kept**

One last question:

If something happened tomorrow, would the person helping your parent know where to start?

This is a starting point, not a complete estate or legacy plan. The Family Legacy Blueprint goes further, helping families organize the bigger picture and prepare the people who may one day need to step in.