



Questions to Ask Your Aging Parents

A Family Information Guide

Help your family know what exists, where to find it, and who to call.

Prepared by _____

With _____

Date started _____

Keep this guide somewhere secure. Never write passwords, PINs, Social Security numbers, or complete account numbers in it.

Before You Begin

There are conversations most families know they should have—but often don't know where to begin.

This guide gives you and your family a simple way to work through the important information together.

You don't have to finish everything in one sitting. Start with what you know. Skip anything that doesn't apply. Come back to the rest later.

If you're completing this with your parent

This isn't an interrogation and it isn't about taking control.

Go at their pace. The goal is simply to make sure the people they trust would know what exists, where to look, and who to call if help were ever needed.

If you're the parent completing this guide

You're not giving up control of anything.

You're simply leaving the people you trust a map so they won't have to figure everything out on their own someday.

Keep sensitive information out of this guide.

Do not include passwords, PINs, Social Security numbers, safe combinations, or complete account numbers. Instead, record what exists, where more information can be found, and who should be contacted.

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About This Plan

Who is this plan for?

Person 1

Name _____

Phone _____ Email _____

Person 2 — spouse or partner, if applicable

Name _____

Phone _____ Email _____

Date completed _____ Date last reviewed _____

Where will this guide be kept?

Who knows where it is?

Name _____

Relationship _____ Phone _____

Who Should We Call First?

“If something happened to you, who should your family contact first?”

First person

Name _____

Relationship _____ Phone _____

Email _____

Second person

Name _____

Relationship _____ Phone _____

Email _____

Is there someone different to contact about a specific matter?

Matter	Name	Phone / Email
Medical		
Financial		
Legal		
Other		

Who Depends on You?

Does anyone depend on you for care or support?

☐ Yes ☐ No ☐ Not sure

If yes:

Name _____ Relationship _____

Who should step in if you can't? _____

Phone _____

Minor children

Do you have minor children?

☐ Yes ☐ No

If yes, have you named a guardian?

☐ Yes ☐ No ☐ Not sure

Guardian _____

Where can your family find the related documents?

Pets

Do you have pets someone would need to care for?

☐ Yes ☐ No

Pet(s) _____

Who should care for them? _____ Phone _____

Veterinarian _____ Veterinarian phone _____

Where are care or medication instructions kept?

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Legal Documents & Decision-Makers

You don't need to put copies of legal documents here. Just help your family know what exists, where it is, and who is responsible.

Will or trust

Do you have a will or trust?

☐ Yes ☐ No ☐ Not sure

Where is the original kept? _____

Does someone you trust know where it is?

☐ Yes ☐ No

Who will handle your estate?

Have you named an executor or trustee?

☐ Yes ☐ No ☐ Not sure

Name _____ Phone _____

Who can make medical decisions for you?

Have you named someone?

☐ Yes ☐ No ☐ Not sure

Name _____ Phone _____

Where is the document? _____

Who can handle financial matters for you?

Do you have a financial power of attorney or similar arrangement?

☐ Yes ☐ No ☐ Not sure

Name _____ Phone _____

Where is the document? _____

Medical wishes

Do you have a living will, advance directive, or other written medical wishes?

☐ Yes ☐ No ☐ Not sure

Where can your family find them?

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Health & Medical Information

This isn't meant to replace your medical records. Include only what someone might need to know or find quickly.

Primary doctor

Name

Practice

 Phone

Important specialist

Name

Specialty

 Phone

Pharmacy

Name _____ Phone _____

Allergies

Do you have important allergies?

☐ Yes ☐ No ☐ Not sure

If yes:

Medications and other medical information

Where can your family find your current medication list and other important medical information?

Insurance

Your family doesn't need every policy detail here. They need to know what coverage exists and where to find it.

What insurance do you have?

☐ Health / Medicare

☐ Life

☐ Long-term care

☐ Homeowners / renters

☐ Auto

☐ Employer-provided coverage

☐ Other

☐ Not sure

Type	Company	Where can the information be found?

Insurance agent or main contact

Name

Company

Phone

Email

Money — Where It Is

A reminder

Don't include passwords, complete account numbers or balances.

Your family simply needs to know where you bank, where investments or retirement accounts are held, and where to find more information.

Banks, investments & retirement accounts

For example: checking, savings, IRA, 401(k), brokerage, pension or other retirement account.

Institution	Type	Where can more information be found?

Regular income

Do you receive regular income someone should know about?

- ☐ Social Security ☐ Pension ☐ Retirement distributions ☐ Business income
☐ Rental income ☐ Other

Where can your family find more information?

Household bills

Who normally handles the household bills?

Are most regular bills on autopay?

- ☐ Yes ☐ Some ☐ No ☐ Not sure

Where can someone find information about regular bills and expenses?

Loans and debts

Are there loans, mortgages, credit cards, or other debts your family should know exist?

☐ Yes ☐ No ☐ Not sure

Where can they find the information?

Business interests

Do you own all or part of a business?

☐ Yes ☐ No

If yes:

Business

Who should your family contact?

 Phone

Where are important business records kept?

Home, Vehicles & Property

Your home

Address _____

☐ Own ☐ Rent ☐ Other

Where can your family find the deed, lease, mortgage information, or other important home records?

Safe or safe-deposit box

Do you have either?

☐ Home safe ☐ Safe-deposit box ☐ Neither ☐ Not sure

Where is it located? _____

Who knows how to access it? _____

A reminder

Don't write combinations, PINs or other access codes here.

Vehicles

Vehicle	Where is the title?	Where are spare keys?

Other property

Do you own other real estate or significant property your family should know about?

☐ Yes ☐ No

If yes:

What is it? _____

Where can more information be found?

Digital Life

Your family may eventually need access to phones, computers, email, online accounts and other digital information.

A reminder

Don't put passwords in this guide.

How do you keep track of passwords?

- ☐ Password manager ☐ Written password book ☐ Secure digital file ☐ Other
- ☐ I don't have a system

Where can your family find instructions for accessing that information?

Does someone you trust know what to do?

- ☐ Yes ☐ No ☐ Not sure

Who?

Important online accounts

Do you have important online accounts your family should know exist?

☐ Yes ☐ No ☐ Not sure

Where can they find a list or more information?

Important Papers

Instead of repeating information you've already provided, use this as a final check.

Do you know where your family could find these if needed?

Important document	Yes	No	Not sure / N/A
Birth certificate(s)	☐	☐	☐
Marriage/divorce records	☐	☐	☐
Will or trust	☐	☐	☐
Powers of attorney	☐	☐	☐
Advance directive / living will	☐	☐	☐
Property deeds	☐	☐	☐
Vehicle titles	☐	☐	☐
Insurance policies	☐	☐	☐
Recent tax returns	☐	☐	☐
Passports	☐	☐	☐
Social Security cards	☐	☐	☐
Military records, if applicable	☐	☐	☐
Funeral/prearrangement documents	☐	☐	☐

Is there one main place where most important papers are kept?

☐ Yes ☐ No

Where? _____

Who else knows? _____

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Professionals Who Help You

These people may already know where records are and how things are organized.

Role	Name	Phone / Email
Attorney		
Accountant / CPA		
Financial advisor		
Insurance agent		
Clergy / faith contact		
Other		

Final Wishes & Arrangements

Your family doesn't need every decision made today. Giving them a starting point can keep them from having to guess later.

Have you made funeral, burial, cremation or memorial arrangements?

☐ Yes ☐ No ☐ Partially ☐ Not sure

Have any arrangements been prepaid?

☐ Yes ☐ No ☐ Partially ☐ Not sure

Funeral home or provider _____ Phone _____

Where is the paperwork? _____

Have you written down your wishes?

☐ Yes ☐ No

Where can they be found? _____

Is there anything especially important to you?

This might include burial or cremation preferences, a cemetery, religious or cultural traditions, clergy to contact, military honors, or other wishes.

Use this space for instructions, explanations, family information—or simply something you'd like your family to know.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

You've Done Something Important for Your Family

You don't have to have everything perfectly organized.

By helping your family know what exists, where to look, and who to call, you've given them something extremely valuable: a place to start.

Keep this guide somewhere secure and make sure at least one person you trust knows where it is.

Next review date _____

KEEP IT CURRENT WITH MYREGISTR

A printed guide gives your family a place to start.

MyRegistr gives you a living Family Map you can update over time and share with the people you choose.

myregistr.com