Quick-Reference Guide (1 of 2)

Print this. Keep a copy in the Family File and one on the fridge.

The Five Gaps

People · Papers · Money · Health · Home. If you can answer "Where is it, and who knows?" for each, you are ahead of most families.

The Seven Sections of the Family File

1. Emergency One-Pager
2. People
3. Health
4. Legal
5. Money
6. Home
7. Digital

The Documents to Locate

Will · Power of attorney for property · Power of attorney for personal care (health-care proxy) · Advance care wishes · Insurance policies · Deed, lease or mortgage · Birth, marriage and citizenship papers · Funeral arrangements

The Hospital Call

Take the one-pager and medication list. Tell one person. Show who the decision-maker is. Take notes. Appoint one communicator. Ask about discharge early. Eat and rest.

The First Week After a Death

Confirm the death. Check the file for wishes. Call a funeral home and ask for prices. Locate the will. Order several death certificates. Secure the home. Log every call. Beware of scams. Accept help.

The Scam Reminder

Anyone who calls asking for your parent's account, health or family information: PAUSE. DISCONNECT. CONFIRM.

The Yearly Review

Pick a date. Walk through the checklist. Replace the old pages. Write "Last reviewed" on page one.

My Trusted Numbers (2 of 2)

Anyone may ask. Everyone may write it down. Nobody is taking over.

Who	Name	Phone
Point Person		
Backup		
Family doctor		
Pharmacy		
Lawyer or notary		
Neighbour with a key		
Health-care decision-maker		

Where things are

Item	Location
Family File (paper)	
Family File (digital folder)	
Emergency Kit	
Will (original)	
Powers of attorney (originals)	
Spare keys	