

SO THE PEOPLE YOU LOVE KNOW WHERE EVERYTHING IS

Family Emergency & Estate Organizer

Contacts, documents, accounts, insurance, digital life, wishes and a what-to-do-first guide. Record-keeping only. Not legal advice.

US Letter · Free sample

Name(s)

Date started

Last reviewed

Emergency Quick Sheet

Fill in this page first. Keep one copy at home where family and caregivers can find it, and one where you can grab it. Update when anything changes.

Who we are

Name

Birth date

Name (2nd person)

Birth date (2nd)

Address

Home phone

Mobile

Mobile (2nd)

Call first

Name / relationship

Phone

Second contact

Phone

Out-of-area contact

Phone

Key medical contacts

Primary doctor

Phone

Pharmacy

Phone

Insurance (name only)

Policy location

Allergies and critical medical alerts

Only what you choose to record.

Who has a key / can enter the home

Children, dependents, and pets who need care

Where to find the full organizer and key documents

DOCUMENTS

Important Documents Locator

Do not write passwords, PINs, full account numbers, or Social Security / government ID numbers in this organizer. Record WHERE things are kept instead.

Document	Exists?	Original kept where	Copy kept where	Last updated
Will	☐			
Trust documents	☐			
Power of attorney	☐			
Health care directive / living will	☐			
Birth certificates	☐			
Marriage certificate / divorce decree	☐			
Passports and IDs	☐			
Military records	☐			
Deed / title	☐			
Mortgage / loan documents	☐			
Vehicle titles	☐			
Insurance policies	☐			
Tax returns (recent years)	☐			
Retirement account statements	☐			
Bank and investment statements	☐			
Social Security / benefits letters	☐			
Business documents	☐			
Funeral or burial arrangements	☐			
Safe deposit box (bank and key)	☐			
Medical records	☐			
	☐			