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Vital Records Workbook

Collecting this type of information is often an easy way to begin discussions about care and legacy. And having the information can give comfort and confidence, knowing you have important details at your fingertips. This workbook could be vital if your loved one becomes unable to respond. Keep in mind that just knowing the location of some documents can be helpful.

Emergency/time of need



Parent or loved one (1)

Vital records	Details
Date of birth	
Social Security number (Put in a secure place to protect this information.)	
Allergies	
Medication (1), dose and timing	
Medication (2), dose and timing	
Medication (3), dose and timing	
Medication (4), dose and timing	
Physical condition Any special considerations? (e.g., walker, cane)	
Mental condition (i.e., need to write things down)	
Hearing-impaired (check one)	Yes No

Parent or loved one (2)

Vital records	Details
Date of birth	
Social Security number (Put in a secure place to protect this information.)	
Allergies	
Medication (1), dose and timing	
Medication (2), dose and timing	
Medication (3), dose and timing	
Medication (4), dose and timing	
Physical condition Any special considerations? (e.g., walker, cane)	
Mental condition (i.e., need to write things down)	
Hearing-impaired (check one)	Yes No

Medical

The following information is helpful to know in case your loved one can't speak for himself or herself, or if you have to act quickly on his or her behalf in an emergency.

Parent or loved one (1)



Medical records	Details
Main doctors <ul style="list-style-type: none">• Family physician• Orthopedic• Internal medicine• Geriatric• Dentist• Eye• Other	
Hospital	
Health insurance provider	
Medical insurance options <ul style="list-style-type: none">• Medicare• Medicaid• Medigap• Part D• Veterans benefits	
Medical directive on file with doctor	Yes No
Primary doctor has contact information	Yes No

Parent or loved one (2)

Medical records		Details	
	<div>Main doctors<ul style="list-style-type: none">• Family physician• Orthopedic• Internal medicine• Geriatric• Dentist• Eye• Other</div>		
	Hospital		
	Health insurance provider		
	<div>Medical insurance options<ul style="list-style-type: none">• Medicare• Medicaid• Medigap• Part D• Veterans benefits</div>		
	Medical directive on file with doctor	Yes	No
	Primary doctor has contact information	Yes	No

Financial

The following information is helpful to know in case your loved one can't speak for himself or herself, or if you have to act quickly on his or her behalf. The legal documentation giving you or a sibling the authority to act must be in place first.

Financial overview



Financial information		Details	
	Location of accounts <ul style="list-style-type: none">• Checking• Savings• Who else is an authorized signer?• Certificates of deposit (CDs)• Safe deposit box<ul style="list-style-type: none">–Second person authorized		
	Receive Social Security (check one)	Yes	No
	Charitable giving <ul style="list-style-type: none">• Alma mater• Church• Other organizations they care about		
	Employment/employer <ul style="list-style-type: none">• Full-time• Part-time		

Current obligations

Expenses	Details
Mortgage <ul style="list-style-type: none">• Who holds it?• Monthly amount, due date	
Monthly rent amount	
Credit cards <ul style="list-style-type: none">• Card(s)/amount due	
Loans <ul style="list-style-type: none">• Lender(s)/amount due/payment	
Utilities <ul style="list-style-type: none">• Phone• Cable• Mobile phone• Electric• Gas• Water/sewer• Garbage/recycling• Other	

Protection

Insurance	Details
Insurance contracts/premiums <ul style="list-style-type: none">• Life• Health• Medical• Dental• Medigap• Long-term care• Disability• Term• Homeowners/renters• Auto• Umbrella liability	

Retirement and other assets

Assets	Details
Types of accounts <ul style="list-style-type: none">• 401(k)• Pension• IRA/SEP IRA• Roth IRA• Trusts• Certificates of deposit (CD)• Bonds/municipal bonds• Other	
Other assets <ul style="list-style-type: none">• Property (vacation home, vehicles)• Home• Jewelry• Furniture• Other	

Contact information

Trusted professionals	Details
Accountant	
Attorney	
Financial professional	
Insurance agents <ul style="list-style-type: none">• Auto• Home• Health• Life• Other	

Legal

Understanding your fiduciary responsibilities is key to ensuring that you are willing to accept the responsibilities—and liabilities—associated with that role once the document is made legal. In addition, making sure your loved one's documents are current will help lessen family issues down the road. You don't need to know the details, but knowing the location of legal documents is important, to allow for easy access when needed.



Legal information	Details
Up-to-date beneficiaries <ul style="list-style-type: none">• Insurance contracts• Retirement plans• Trusts• Will• Payable on death	
Wills or trusts <ul style="list-style-type: none">• Are they current?• Do they still reflect his or her desires?	
Titles/Deeds <ul style="list-style-type: none">• Auto• Home• Real estate• Other	
Authorized cosigners <ul style="list-style-type: none">• Checking• Savings• Other	
Health care directive	
Living wills	
Power of attorney	
Executor	
Divorced? If yes: <ul style="list-style-type: none">• Divorce date• Marriage date• Where is a copy of the divorce decree?	

Other

It is good to know the whereabouts of the following information. If passwords and other sensitive information are written here, keep this document secured as it could be detrimental if it were lost or stolen.



Computer

Computer, online accounts	Access details
Email account addresses	
Computer WiFi/internet access	
Social media account(s)	
Online bill payments Company One Company Two Company Three	
Other	

Important documents

Other vital records	Details
Birth certificates	
Death certificate if one parent is already deceased	
Marriage certificate	
Military documents (e.g., discharge papers)	
Passports	
Memberships 1. 2.	

Contact

Name	Contact information, nature of relationship
Trusted contact person(s) Friends 1. 2. 3. 4.	
Neighbors 1. 2. 3.	
Church leaders 1. 2. 3.	
Others, such as helpers for home repair 1. 2. 3.	

General funeral/burial

Funeral and burial wishes	Details
Family plot/crypt/mausoleum/columbarium	
Memorial service?	Yes No
Funeral/burial instructions (e.g., type of service, Bible verses, music)	
Other	

