Aging Parent Information Organizer

Essential Information, One Organized Place, More Confidence When You Need It

A practical caregiver tool for gathering health, legal, financial, household, and personal information before it is urgently needed.

A free resource from

The Caregiving Concierge™

by AdVantage Digital

thecaregivingconcierge.com

Aging Parent Information Organizer

Quick reference | contacts | health snapshot

The details you may need first, gathered before you need them fast.

Start here. Fill in what you know today, leave blanks when needed, and return to the organizer over time. Keep completed copies in a secure location that trusted caregivers can access when appropriate.

FULL LEGAL NAME

PREFERRED NAME

DATE OF BIRTH

PRIMARY PHONE

EMAIL

HOME ADDRESS

CURRENT LIVING ARRANGEMENT

- [ ] Lives independently
- [ ] Lives with family
- [ ] Independent living
- [ ] Assisted living
- [ ] Memory care
- [ ] Skilled nursing / rehab
- [ ] Other

1 EMERGENCY CONTACTS

PRIMARY EMERGENCY CONTACT

NAME

RELATIONSHIP

PHONE

SECONDARY EMERGENCY CONTACT

NAME

RELATIONSHIP

PHONE

2 QUICK HEALTH SNAPSHOT

PRIMARY CARE PROVIDER

PHONE

PREFERRED HOSPITAL

PRIMARY PHARMACY

MAJOR MEDICAL CONDITIONS

MEDICATION ALLERGIES

OTHER IMPORTANT ALLERGIES

QUICK-ACCESS NOTE

Who has a spare key or approved home access? Who lives nearby? Add the person you would want someone to call if plans suddenly change.

NEIGHBOR / NEARBY CONTACT

PHONE

CAREGIVER / CARE AGENCY

PHONE

© 2026 The Caregiving Concierge™

Educational only - not medical, legal, financial, or insurance advice.

Aging Parent Information Organizer

Health history | providers | equipment

Parent / loved one: _____

3 HEALTH AND MEDICAL INFORMATION

Use this page for the health information another caregiver, clinician, or family member may need to understand the current care picture.

PRIMARY CARE PROVIDER

NAME

PRACTICE

PHONE

PATIENT PORTAL / SYSTEM

SPECIALISTS

PROVIDER	SPECIALTY	PHONE / NOTES

CURRENT DIAGNOSES OR ONGOING CONDITIONS

MAJOR SURGERIES OR HOSPITALIZATIONS

FUNCTIONAL OR COMMUNICATION NEEDS

- ☐ Mobility / walking
- ☐ Fall risk
- ☐ Vision
- ☐ Hearing
- ☐ Memory / thinking
- ☐ Speech / communication
- ☐ Transfer assistance
- ☐ Other

MEDICAL EQUIPMENT AND SUPPLIES

- ☐ Walker
- ☐ Cane
- ☐ Wheelchair
- ☐ Oxygen
- ☐ CPAP / BiPAP
- ☐ Hearing aids
- ☐ Dentures
- ☐ Glucose monitor
- ☐ Incontinence supplies
- ☐ Other

EQUIPMENT SUPPLIER / COMPANY

PHONE

SAFETY NOTE

Do not rely on this organizer as the only source of medical information. Keep official medication lists, discharge paperwork, and clinical instructions with the care records.

© 2026 The Caregiving Concierge™

Aging Parent Information Organizer

Medication list | allergies | pharmacy

Parent / loved one: _____

4 CURRENT MEDICATIONS

Include prescription medications, over-the-counter medicines, vitamins, and supplements. If the full list is stored elsewhere, note exactly where it is kept.

MEDICATION LIST

MEDICATION	DOSE	WHEN TAKEN	REASON / PURPOSE	PRESCRIBER

ADDITIONAL MEDICATION LIST LOCATED

WHO ORGANIZES OR MANAGES MEDICATIONS?

PRIMARY PERSON / PHARMACY / SERVICE

PHONE

ADDRESS / LOCATION

KNOWN ALLERGIES OR REACTIONS

MEDICATION / SUBSTANCE	REACTION	NOTES

MEDICATION REMINDER

MEDICATION REMINDER

Keep this list current after hospital stays, specialist visits, and medication changes. Start, stop, or change medications only according to instructions from the appropriate healthcare professional.

© 2026 The Caregiving Concierge™
Educational only - not medical, legal, financial, or insurance advice.

Aging Parent Information Organizer

Coverage | benefits | plan contacts

Parent / loved one: _____

5 INSURANCE, BENEFITS AND COVERAGE

MEDICARE

- [ ] Original Medicare
- [ ] Medicare Advantage
- [ ] Not currently enrolled
- [ ] Unsure

PLAN / PROVIDER

MEMBER ID - LAST 4 DIGITS ONLY

INSURANCE CARD LOCATION

CUSTOMER SERVICE PHONE

PRESCRIPTION COVERAGE

PLAN / PROVIDER

MEMBER ID - LAST 4 DIGITS ONLY

PREFERRED PHARMACY

PHONE

SUPPLEMENTAL OR SECONDARY INSURANCE

COMPANY / PLAN

MEMBER ID - LAST 4 DIGITS ONLY

CUSTOMER SERVICE PHONE

POLICY / CARD LOCATION

OTHER BENEFITS

- [ ] Medicaid
- [ ] Long-term care insurance
- [ ] Veterans benefits
- [ ] Retiree benefits
- [ ] Disability benefits
- [ ] Community aging services
- [ ] Transportation benefits
- [ ] Meal assistance
- [ ] Other

LONG-TERM CARE INSURANCE, IF APPLICABLE

COMPANY

POLICY - LAST 4 DIGITS ONLY

CLAIMS / CONTACT PHONE

POLICY DOCUMENTS LOCATED

PRIVACY TIP

Use only the last four digits of account or policy numbers here. Store complete cards, policies, and identification securely.

BENEFITS / COVERAGE NOTES

© 2026 The Caregiving Concierge™

Educational only - not medical, legal, financial, or insurance advice.

Aging Parent Information Organizer

Legal documents | decision-makers | final wishes

Parent / loved one: _____

6 LEGAL AND ADVANCE PLANNING

Knowing whether key documents exist, who has authority, and where originals or copies are kept can save critical time. This page records locations, not legal advice.

HEALTH CARE DOCUMENTS

HEALTH CARE POWER OF ATTORNEY / PROXY ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

ADVANCE DIRECTIVE / LIVING WILL ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

POLST / MOLST / POST OR SIMILAR ORDER, IF APPLICABLE ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

FINANCIAL AND ESTATE DOCUMENTS

FINANCIAL POWER OF ATTORNEY ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

WILL ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

TRUST, IF APPLICABLE ☐ Completed ☐ Not completed ☐ Unsure

AGENT / NAME

DOCUMENT LOCATION

PROFESSIONAL CONTACTS

PROFESSIONAL	ROLE / FIRM	PHONE / NOTES

FINAL WISHES

If wishes, prepaid arrangements, cemetery information, military burial benefits, or donation preferences are documented, note where those instructions are stored.

© 2026 The Caregiving Concierge™

Aging Parent Information Organizer

Financial snapshot | recurring bills | records

Parent / loved one: _____

7 FINANCIAL AND HOUSEHOLD SNAPSHOT

IMPORTANT PRIVACY REMINDER

Do not write full account numbers, Social Security numbers, PINs, passwords, or security answers in this organizer. Use the last four digits when helpful and record where secure information is stored instead.

BANKING

INSTITUTION	ACCOUNT TYPE	LAST 4 DIGITS / RECORD LOCATION

INCOME SOURCES

- ☐ Social Security
- ☐ Pension
- ☐ Retirement distributions
- ☐ Annuity
- ☐ Employment income
- ☐ Veterans benefits
- ☐ Rental income
- ☐ Disability benefits
- ☐ Other

REGULAR HOUSEHOLD EXPENSES

- ☐ Mortgage / rent
- ☐ Electricity
- ☐ Gas
- ☐ Water / sewer
- ☐ Internet / phone
- ☐ Home insurance
- ☐ Auto insurance
- ☐ Property taxes
- ☐ HOA fees
- ☐ Credit cards
- ☐ Medical bills
- ☐ Care services
- ☐ Subscription services
- ☐ Other

WHICH BILLS ARE ON AUTOMATIC PAYMENT?

WHERE ARE BILLING RECORDS KEPT?

IMPORTANT FINANCIAL RECORDS

- ☐ Recent tax returns
- ☐ Bank statements
- ☐ Investment statements
- ☐ Property documents
- ☐ Vehicle titles
- ☐ Insurance policies
- ☐ Pension information
- ☐ Social Security correspondence

RECORDS ARE LOCATED

© 2026 The Caregiving Concierge™
Educational only - not medical, legal, financial, or insurance advice.

Aging Parent Information Organizer

Home services | routines | personal preferences

Parent / loved one: _____

8 HOME, SERVICES AND DAILY LIFE

HOME INFORMATION

- [ ] Owns home
- [ ] Rents
- [ ] Lives with family
- [ ] Senior community
- [ ] Other

PROPERTY MANAGER / LANDLORD / HOA

PHONE

HOUSEHOLD SERVICES

SERVICE	PROVIDER / COMPANY	PHONE / CONTACT

CARE AND SUPPORT SERVICES

- [ ] Home health
- [ ] Personal care aide
- [ ] Housekeeping
- [ ] Meal delivery
- [ ] Transportation
- [ ] Adult day services
- [ ] Physical therapy
- [ ] Occupational therapy
- [ ] Hospice / palliative care
- [ ] Other

PETS, IF APPLICABLE

PET NAME / TYPE

VETERINARIAN

PHONE

EMERGENCY PET CARE CONTACT

DAILY ROUTINE AND PREFERENCES

TYPICAL WAKE-UP TIME

TYPICAL BEDTIME

USUAL MEAL TIMES

FAVORITE FOODS

FOODS DISLIKED / AVOIDED

DIETARY RESTRICTIONS

PREFERRED ACTIVITIES, HOBBIES, IMPORTANT SOCIAL CONNECTIONS

RELIGIOUS, SPIRITUAL, CULTURAL, OR PERSONAL TRADITIONS THAT MATTER

THINGS THAT BRING COMFORT

THINGS THAT MAY CAUSE ANXIETY, FRUSTRATION, OR DISTRESS

WHAT HELPS ON A DIFFICULT DAY?

© 2026 The Caregiving Concierge™
Educational only - not medical, legal, financial, or insurance advice.

Aging Parent Information Organizer

Important records | digital access | devices

Parent / loved one: _____

9 IMPORTANT RECORDS AND DIGITAL INFORMATION

WHERE ARE IMPORTANT RECORDS KEPT?

RECORD	LOCATION
Birth certificate	
Marriage certificate	
Social Security card	
Military records	
Insurance policies	
Property deed / lease	
Vehicle title	
Tax records	
Legal / medical records	

DIGITAL SAFETY

Do not write passwords here. Record the service and where secure login information or recovery instructions are stored instead.

DIGITAL ACCOUNTS AND ACCESS

EMAIL PROVIDER

RECOVERY EMAIL / TRUSTED CONTACT

PASSWORD MANAGER OR SECURE CREDENTIAL LOCATION

PATIENT PORTAL(S)

ONLINE BANKING / FINANCIAL INSTITUTIONS

SOCIAL MEDIA OR DIGITAL ACCOUNTS THAT MAY EVENTUALLY NEED ATTENTION

CELL PHONE CARRIER

CLOUD PHOTO / STORAGE SERVICE

DEVICES

PRIMARY CELL PHONE

TABLET / COMPUTER

WHERE DEVICE ACCESS INSTRUCTIONS ARE SECURELY STORED

© 2026 The Caregiving Concierge™

Aging Parent Information Organizer

Emergency ready | review | keep current

Parent / loved one: _____

10 EMERGENCY GRAB-AND-GO INFORMATION

INFORMATION TO HAVE READY

- ☐ Photo identification
- ☐ Medicare / insurance cards
- ☐ Current medication list
- ☐ Allergy information
- ☐ Medical conditions list
- ☐ Primary care provider info
- ☐ Specialist information
- ☐ Emergency contact list
- ☐ Health care POA / proxy
- ☐ Advance directive
- ☐ Relevant medical orders
- ☐ Recent discharge information

PERSONAL ITEMS THAT MAY BE NEEDED

- ☐ Eyeglasses
- ☐ Hearing aids / charger
- ☐ Dentures
- ☐ Mobility aid
- ☐ Phone / charger
- ☐ Comfortable clothing
- ☐ Non-slip shoes
- ☐ CPAP / essential equipment

EMERGENCY NOTES

PREFERRED HOSPITAL

IMPORTANT COMMUNICATION NEEDS

MOBILITY / TRANSFER ASSISTANCE NEEDED

MEMORY / COGNITIVE INFORMATION STAFF SHOULD KNOW

KEEP IT CURRENT

- ☐ Medication changes
- ☐ New diagnosis
- ☐ Insurance changes
- ☐ Provider changes
- ☐ Hospitalization
- ☐ Move / living change
- ☐ Legal document update
- ☐ Caregiver / contact change
- ☐ Financial responsibility change
- ☐ Review at least every 6 months

UPDATE LOG

DATE REVIEWED	UPDATES MADE

YOU DO NOT HAVE TO HOLD IT ALL IN YOUR HEAD

Everything about your loved one's care, organized in one place.

The Caregiving Concierge™ helps families organize appointments, medications, providers, documents, schedules, and other important care information in one shared workspace.

thecaregivingconcierge.com

SCAN TO LEARN MORE

© 2026 The Caregiving Concierge™

Educational only - not medical, legal, financial, or insurance advice.