



Your Family Information Organizer

This guide helps you organize your family's important information so it can be easily found when it is needed most.

Written by

Carol Van Erven

Candidate for Judge of the Orphans' Court



Build Your Family Library

This guide is part of a growing series designed to help Maryland families understand estate planning, probate, and important decisions—one topic at a time.

- ☐ Understanding the Orphans' Court
- ☒ Your Family Information Organizer
- ☐ The First Week After the Loss of a Loved One
- ☐ Planning for Illness and Incapacity
- ☐ What Happens If There Isn't a Will?
- ☐ Maryland Estate Planning Resources & Glossary

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Download the complete Family Guide Library, updated editions, and additional educational resources.

IMPORTANT NOTE

This guide is provided for educational purposes only and is not legal advice. Maryland law may change, and every family's circumstances are unique. Please consult an attorney or other qualified professional regarding your specific situation.



Your Family Information Organizer

A place to organize the information your family may need.

How to Use This Organizer

This organizer is designed to help your family locate important information when it is needed. Record information as completely as possible and update it whenever changes occur.

Keep this organizer in a secure location and make sure a trusted person knows where it can be found.

Review it at least once a year and update it whenever important information changes.

Personal Information

Full Legal Name: _____

Preferred Name: _____

Date of Birth: _____

Address: _____

Phone: _____

Email: _____

Identification Information/Location: _____

Pets and Dependents

Pet(s) Name: _____

Type: _____

Veterinarian: _____

Phone: _____

Care Instructions: _____

Designated Caregiver: _____

Phone: _____

Health Care and Emergency Information

Primary Medical Providers: _____

Hospital or Medical Facility (if applicable): _____

Health Insurance Provider: _____

Insurance Card ☐ Copy attached

Emergency Contacts: _____

Medical Records Access Information: _____

Legal Documents: _____

End-of-Life and Funeral Information

Funeral Home: _____

Address: _____

Phone: _____

Funeral Director: _____

Pre-Need Contract Information: _____

Funeral Instructions Location: _____

Burial or Cremation Preference: _____

Cemetery Information: _____

Financial Information

Recurring Payments and Subscriptions

Review bank statements, credit card statements, and online accounts to identify recurring payments, subscriptions, and automatic renewals.

Location of account information: _____

Digital Information

Important online accounts may include Apple ID, Google account, social media, photo storage, and other online services.

REMINDER

Do not record passwords in this organizer. Record only where secure access information can be found.

Important Locations Checklist

- ☐ Original Will: _____
- ☐ Trust Documents: _____
- ☐ Deeds and Titles: _____
- ☐ Insurance Policies: _____
- ☐ Tax Returns: _____
- ☐ Funeral Instructions: _____
- ☐ Digital Access Information: _____
- ☐ Safe Deposit Box Information: _____

Annual Review Checklist

- ☐ Update contact information
- ☐ Review beneficiaries
- ☐ Confirm document locations
- ☐ Update digital access information
- ☐ Review insurance policies
- ☐ Review health care directives and powers of attorney

How to Become Better Prepared

Explore the Complete Family Guide Library

The Family Guide Series provides practical, easy-to-use guidance to help Maryland families prepare, stay organized, and make informed decisions before information is urgently needed.

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Educational Disclaimer

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