

CALVARY
HOSPITAL

Where Life Continues



What Matters Most

A GUIDE FOR FAMILIES



WHAT MATTERS MOST: A GUIDE FOR FAMILIES

At Calvary, we see firsthand the benefits families experience when vital information and personal wishes are written down and easy to find. This guide is not a legal document, but a practical tool to help you gather details, record choices, and keep everything in one place—offering clarity in times of illness, loss, or uncertainty, and easing the burden on those you love.

By completing this guide, you will have a single, trusted resource that brings together your vital information, wishes, and values—giving your loved ones clarity, comfort, and peace of mind when it matters most.

STEP 1: GETTING STARTED

WHY THIS MATTERS

This guide will help you gather, organize, and record the essential information every adult should have in a clear, accessible format.

By compiling everything in one organized resource, the people you trust will be able to quickly find what they need in an emergency, during illness, or after your death—reducing stress and uncertainty and providing guidance.

YOUR PERSONAL INFORMATION

Full legal name: _____ Date of birth: _____
Social Security number: _____ Legal residence: _____

EMERGENCY CONTACTS

Name: _____ Phone: _____
Name: _____ Phone: _____

DEPENDENTS

Names of Children, adult dependents, or pets: _____

KEY PEOPLE OR RELATIVES OR FAMILY MEMBERS TO NOTIFY:

ADDITIONAL PERSONAL & IDENTIFICATION DOCUMENTS

Marriage certificate/divorce decree (document name/location): _____
Adoption records (document name/location): _____
Military records (DD-214 or similar, document name/location): _____

STEP 2: HEALTHCARE PLANNING

WHY THIS MATTERS

Writing down your medical wishes ensures that your care reflects your values. In New York State, healthcare decisions can only be honored if they are clearly expressed in writing. While it may feel daunting, completing this step is straightforward and provides your loved ones and care team with the clarity they need.

In the section below, you will find space to record and organize the key documents that make up an advance care plan. We recommend keeping copies of every document with this guide— noting where originals and digital files are stored—so they can be quickly accessed when needed. You might also wish to provide an electronic copy of your healthcare proxy, HIPAA authorization, and living will to your healthcare agent. If this person ever needs to make healthcare decisions on your behalf, they will need to provide proof of their authority to act. Having an electronic copy eliminates the stress of having to retrieve a physical document.

LIVING WILL

☐ Yes ☐ No

Location of document (paper or computer file): _____

Notes (treatments you do or do not want—ventilators, tube feeding, CPR, etc.): _____

HEALTHCARE PROXY / MEDICAL POWER OF ATTORNEY

Primary: _____ Phone: _____

Alternate: _____ Phone: _____

Location of document: _____

Notes (why you chose this person): _____

HIPAA AUTHORIZATION

☐ Yes ☐ No

Location of document (paper or computer file): _____

DO-NOT-RESUSCITATE (DNR) ORDER

☐ Yes ☐ No

Location of signed form: _____

Doctor's name & phone: _____

CURRENT DOCTORS AND SPECIALISTS

Primary care: _____ Phone: _____

Specialist(s): _____ Phone: _____

CURRENT MEDICATIONS

Medication / Dose / Prescribing doctor: _____

File or list location (if stored electronically): _____

HEALTH INSURANCE

Primary provider: _____ Policy #: _____

Secondary insurance: _____ Policy #: _____

Location of insurance cards / digital files: _____

MEDICAL HISTORY & ALLERGIES

Major conditions: _____

Allergies: _____

Location of records: _____

CARE PREFERENCES

☐ Home ☐ Hospital ☐ Hospice facility

Other preferences: _____

STEP 3: FINANCIAL & LEGAL PLANNING

WHY THIS MATTERS

Having your financial and legal information clearly organized ensures that bills can be paid, accounts accessed, and assets managed the way you intended.

In the section below, you'll find prompts to record the key documents, accounts, and contacts that make up your financial and legal plan. We recommend making copies of important documents to keep with this guide, and noting the exact location (or digital file path) of originals so they can be quickly accessed when needed.

ESTATE PLANNING DOCUMENTS

Will: ☐ Yes ☐ No | Location: _____ Digital file: _____

Living trust: ☐ Yes ☐ No | Location: _____ Digital file: _____

Durable power of attorney for finances: _____ Location: _____

Guardianship instructions: _____ Location: _____

Prenuptial/postnuptial agreements: _____ Location: _____

BANKING & CREDIT

Bank accounts: _____ Location of statements: _____ TCP: _____

Credit cards: Issuer : _____ Account #: _____ Location of records: _____

Debit cards: Issuer : _____ Account #: _____ Location of records: _____

Safe deposit box: Location _____ Key with: _____ Backup location/digital note: _____

INVESTMENTS & RETIREMENT

Retirement accounts: _____ Location: _____ TCP: _____

Brokerage accounts: _____ Location: _____ TCP: _____

Stock options / restricted stock: _____ Location: _____

Business ownership interests: _____ Location: _____

INSURANCE POLICIES

Life insurance: Carrier _____ Policy #: _____ Location: _____

Disability insurance: Carrier: _____ Policy #: _____ Location: _____

Long-Term care insurance: Carrier: _____ Policy #: _____ Location: _____

Health insurance: Carrier: _____ Policy #: _____ Location: _____

Property (home/renters): _____ Policy #: _____ Location: _____

Auto: _____ Policy #: _____ Location: _____

Umbrella/Other: _____ Policy #: _____ Location: _____

DEBTS & LIABILITIES

Mortgage(s): Lender: _____ Balance: _____ Location of documents: _____

Home equity loans: _____ Location: _____

Car loans: _____ Location: _____

Personal loans: _____ Location: _____

Other debts: _____ Location: _____

TAXES & RECORDS

Most recent personal tax return: Location _____ Digital file: _____
 Business tax returns: Location _____ Digital file: _____
 Accountant/tax preparer: Name _____ Phone: _____

KEY ADVISORS

Attorney: _____ Phone: _____
 Accountant: _____ Phone: _____
 Financial planner/advisor: _____ Phone: _____
 Insurance agent(s): _____ Phone: _____
 Employer/HR contact: _____ Phone: _____

PROPERTY RECORDS

Vehicle titles/registrations: _____ Location: _____

STEP 4: END-OF-LIFE PREFERENCES

WHY THIS MATTERS

Your words here will be a lasting gift of peace, offering your loved ones comfort and guidance in tender moments. By documenting your wishes in advance, you ensure that decisions about your care, services, and personal legacy reflect your values—sparing your family the burden of having to make choices without your direction.

ADVANCE CARE CHOICES

DNR Order: ☐ Yes ☐ No | Location of signed form: _____
 Comfort care/hospice preferences: _____
 Preferred location of care: _____

ORGAN AND BODY DONATION

Organ donation: ☐ Yes ☐ No | Registered: ☐ Yes ☐ No
 Body donation for research/education: ☐ Yes ☐ No | Institution: _____ Location of paperwork: _____

FUNERAL OR MEMORIAL SERVICE

Type: ☐ Funeral ☐ Memorial ☐ None
 Service location: _____
 Clergy / celebrant: _____
 Music, readings, or speakers: _____
 Pallbearers: _____

BURIAL, CREMATION, OR OTHER

Burial: Cemetery / plot #: _____ Records location: _____

Cremation: ☐ Yes ☐ No | Distribution of ashes: _____

Green burial / alternative: _____

Prepaid arrangements: ☐ Yes ☐ No | Location of records: _____

OTHER PERSONAL WISHES

Obituary Notes: _____

Tombstone inscription: _____

Pet care instructions: _____

Distribution of Special heirlooms / keepsakes: _____

STEP 5: DIGITAL LIFE & RECORDS

WHY THIS MATTERS

Today, much of our personal, financial, and family life is connected to the digital world. Email, online banking, and photo storage may hold vital information and treasured memories that could be difficult—or even impossible—for loved ones to recover without explicit instructions. By writing down your digital accounts, passwords, and storage locations, you make sure the people you trust can easily find and manage what's important.

DIGITAL ACCOUNTS & ACCESS

Email accounts: _____ Login details / location: _____

Social media accounts: _____ Login details / location: _____

(If additional space is required, please continue in the Notes section.)

Online banking / bill Pay: _____ Institution(s): _____ Login details / location: _____

Cloud storage / subscriptions (e.g., iCloud, Dropbox, Netflix): _____ Login details / location: _____

Password manager (e.g., LastPass, 1Password): _____ Master password location: _____

Computer / tablet / phone passcodes: _____ Backup location: _____

PHYSICAL SECURITY & STORAGE

Safe deposit boxes / safes: Location _____ Key/combination with: _____

ADDITIONAL NOTES

STEP 6: FAMILY LEGACY & VALUES (OPTIONAL)

WHY THIS MATTERS

The notes people share here often become the most cherished part of this guide. Take your time with this section—sit with these questions and answer them fully and honestly. Beyond documents and instructions, your words, stories, and blessings are gifts that connect generations. Recording your memories, values, and hopes ensures that your family carries forward not just what you own, but who you are and what matters most to you.

REFLECTIONS & LEGACY

Ethical will or letter to family: _____

Family history / henealogy: _____

Special memories or life lessons: _____

Hopes, blessings, or quotes: _____

Favorite poems, scriptures, or stories: _____

Personal property list (with meaning attached): _____

STEP 7: ADDITIONAL TOOLS & RESOURCES

- Essential documents' checklist: [Essential Documents Every Adult Should Have](#)
- State-specific advance directive forms (free online)
- Local bar associations and legal aid offices
- Eldercare Locator: <https://eldercare.acl.gov>

CLOSING

This guide is not a substitute for legal or financial counsel, but a companion to it. It's helpful to review it each year and ensure that reflects the current state of your life. Completing it is a simple act of love—one that can give your loved ones clarity and peace of mind.

Consider bringing your children and loved ones together for a family gathering or meeting. This is a forum for you to express your healthcare, end-of-life, and funeral wishes, share your legacy and values with your children, and—importantly – invite your loved ones to ask questions.

At Calvary, we know that what truly matters is not the paperwork, but the people it protects and authorizes care for.