



Estate Planning with Heart®  
De Fonte Law PC

# Care Team Card

## FIRST 48 HOURS

Purpose: Give the right people exactly what they need in the first 48 hours after incapacity or death.  
Keep a copy at home (on the inside of a cabinet door), in your binder, and in the glove box.

### Who Is In Charge

Role	Name & Phone/Email	Backup (Name & Phone/Email)
Health Care Agent (AHCD)	_____	_____
Agent under DPOA (Finances)	_____	_____

### Key Providers & Contacts

Primary Doctor \_\_\_\_\_

Pharmacy \_\_\_\_\_

Insurance (Medical) \_\_\_\_\_

Insurance (Home/Auto/Life) \_\_\_\_\_

Attorney (Estate Planning) \_\_\_\_\_

CPA \_\_\_\_\_

Financial Advisor / Trustee \_\_\_\_\_

## Medical Snapshot

Medications / Dosages \_\_\_\_\_

Allergies \_\_\_\_\_

Conditions / Recent Procedures \_\_\_\_\_

Preferred Hospital / Advance Directives \_\_\_\_\_

Location \_\_\_\_\_

Other Notes \_\_\_\_\_

## Documents & Access

Trust / Will location \_\_\_\_\_

AHCD / HIPAA location \_\_\_\_\_

DPOA (Finances) location \_\_\_\_\_

Password Manager (emergency access) \_\_\_\_\_

Safe / Keys / Codes \_\_\_\_\_

Digital Executor / Instructions \_\_\_\_\_

## Immediate To-Dos

Secure home and pets

Pause autopays if needed

Notify key contacts/employer

Arrange short-term care

Bring this card to first appointments