

Valuable Documents at Your Fingertips

USEFUL INFORMATION

Name	_____
Date Completed	_____
Primary Doctor	_____
<i>Phone</i>	_____
Other Doctor	_____
<i>Phone</i>	_____
Dentist	_____
<i>Phone</i>	_____
Pharmacy	_____
<i>Phone</i>	_____
Lawyer	_____
<i>Phone</i>	_____
Accountant	_____
<i>Phone</i>	_____
Power of Attorney	_____
<i>Phone</i>	_____
Healthcare Agent	_____
<i>Phone</i>	_____
Investment Broker	_____
<i>Phone</i>	_____
Faith Leader	_____
<i>Phone</i>	_____
Name of Bank	_____
<i>Acct #</i>	_____
Name of Bank	_____
<i>Acct #</i>	_____
Emergency Contact	_____
<i>Phone</i>	_____
Emergency Contact	_____
<i>Phone</i>	_____

Excerpt from AARP's Planning for Long-Term Care Guide: https://assets.aarp.org/www.aarp.org/_cs/health/ltc_resource_guide.pdf

PERSONAL INFORMATION

Where Is It Kept?

Social Security #	_____
Birth Certificate	_____
Marriage Certificate	_____
Divorce Papers	_____
Military Records:	
<i>Military ID #</i>	_____

<i>Dates of Service</i>	

<i>Branch of Service</i>	

Organ Donor Card	_____
Passport/ Citizenship Papers	_____
Will	_____
Trusts	_____
Safety Deposit Box:	
<i>Where are keys kept?</i>	_____
<i>Number</i>	_____

INSURANCE INFORMATION

Where Is It Kept?

Automobile	_____
Disability	_____
Homeowners	_____
Life	_____
Long-Term Care	_____
Health	_____
<i>Other</i>	_____

FINANCIAL INFORMATION

Where Is It Kept?

**Automobile Title/
Registration**

**Automobile Title/
Registration**

Bank Statements

Bonds

CDs

Bank Account:

Checking

Savings

Money Market

401K Account

IRAs

Mortgage Information

Outstanding Loans

Property Deeds/Title

Stock Certificates

Income Tax Records

Pension Records

Utility Bills

MEDICAL INFORMATION

Where Is It Kept?

Advance Directives

Do Not Resuscitate
Papers

Healthcare Power
of Attorney

Living Will

FINAL WISHES

Where Is It Kept?

Letter of Instruction

Burial Arrangements

Cemetery Information

Funeral Home
