

caring
for those
you care
about

Planning for the Future: Valuable Documents at Your Fingertips

Whether your parent is in perfect health or is suffering from chronic illness, learning where valuable documents are located can help you determine your parent's needs and expectations, and the knowledge you gain can assist you in providing the best care for your parent if the need arises.

This form has been designed to help you and your parent work together to locate these documents before a crisis occurs. By having this conversation now, both of you will gain peace of mind that important information is available should you need it.

Date Completed _____

Useful Information

Name _____

Social Security Number _____

Emergency Contact _____

Telephone _____

Where are your documents kept?

Birth Certificate _____

Marriage Certificate _____

Divorce Papers _____

Military Records _____

Branch of Service _____

Military ID# _____

Dates of Service _____

Passport/Citizenship Papers _____



Financial and Legal Information

caring
for those
you care
about

Name of Bank
Account # (Checking)

Name of Bank
Account # (Savings)

Name of Bank
Account # (Money Market)

Accountant
Telephone

Investment Broker
Telephone

Lawyer
Telephone

Power of Attorney
Telephone

Where are your documents kept?

Bank Statements _____

Bonds _____

CDs _____

401K Account _____

IRAs _____

Mortgage Information _____

Property Deeds/Title _____

Automobile Title/Registration _____

Outstanding Loans _____

Stock Certificates _____

Income Tax Records _____

Pension Records _____

Will _____

Trusts _____

Safety Deposit Box _____

Number _____

Location of Keys _____



Insurance Information

Where are your documents kept?

Automobile _____

Disability _____

Homeowners _____

Life _____

Long-Term Care _____

Health _____

Other _____

Medical Information

Primary Doctor _____

Telephone _____

Healthcare Agent _____

Telephone _____

Healthcare Power of Attorney _____

Telephone _____

Where are your documents kept?

Advance Directives _____

Do Not Resuscitate Papers _____

Living Will _____

Organ Donor Card _____

Final Wishes

Clergy _____

Telephone _____

Funeral Home _____

Telephone _____

Where are your documents kept?

Burial Arrangements _____

Cemetery Information _____

To protect yourself from identity theft, never email this form if it includes your personal information.

caring
for those
you care
about

