

# Key Document List

Lists of important documents, provided in several categories, that caregivers should have to provide information about your older dependent person.

## Personal and Family

- Birth certificates
- Marriage certificate
- Citizenship papers
- Divorce/separation papers
- Adoption papers
- Social Security numbers/cards
- Passports (numbers, expiration dates)
- Driver's licenses (numbers, expiration dates)
- Military record

## Medical

- Health care professionals (names, address/telephone)
  - Physicians
  - Dentists
  - Pharmacists
  - Other professionals
- Health care proxies/living wills
- Medications (dosages, purpose, name of prescribing physicians, pharmacy, address/telephone)
- Hospitals of choice (address/telephone)
- Medicare numbers
- Medicaid numbers (caseworker numbers, address/telephone)
  
- Social worker or caseworker names (address/telephone)

## Insurance

- Life
- Health
- Medigap - supplemental health
- Long-term care
- Dental
- Disability
- Homeowners/renters
- Liability
- Automobile

(For each policy list company name, policy number, and location)

## Financial

- Income sources (retirement and/or disability benefits, Social Security, etc.)
- Financial assets (institution names, account numbers, address/telephone, form of ownership, current value)
  - Cash
  - Money market funds
  - Bank accounts
  - Retirement and pension plans
  - Stocks
  - IRAs
  - Bonds
  - Annuities
  - Mutual funds
  - Life insurance
- Real estate (property addresses, location of deeds, form of ownership, insurance, current value)
  - Primary home (House Deed)
  - Investment property
  - Vacation home
- Other assets (location of items/titles/documents, form of ownership, insurance, current value)
  - Automobiles (car title)
  - Collectibles
  - Boats
  - Interests in businesses
  - Inheritances
  - Hidden valuables/items in storage
  - Precious gems, jewelry
  - Loans to family members/friends
- Liabilities (creditor institutions, address/telephone, approximate debt)
  - Mortgages
  - Notes
  - Personal loans
  - Safety deposit box
  - IOUs
  - Credit cards
  - Other

## **Legal**

- Wills (dates of documents, executor names, address/telephone)
- Powers of attorney or durable powers of attorney (names, including backup, address/telephone)
- Advance medical directives
  - Durable medical powers of attorney
  - Health care proxies
  - Living wills
- Guardianships/conservatorships (names, address/telephone)
- Trust agreements

## **Other Information**

- Inventory of family historical records (documents, photos, keepsakes)
- Burial instructions (funeral home location, name of director, whether funeral has been prepaid, cemetery plot location, organ donor instructions)
- Safe deposit boxes (institution names, address/telephone, location of keys and list of contents, other names on safe deposit boxes)
- Tax records

## **Other Important Contacts**

- Professional advisors other than health care (name, address/telephone)
  - Attorneys
  - Insurance agents
  - Financial advisors
  - Stockbrokers
  - Bankers
  - Clergy
  - Accountants
- Past employers (company names, address/telephone, dates of retirement, contact persons, employee ID numbers)
- Close friends and neighbors (names, address/telephone, indicate those who have keys to house/apartment/condominium)
- Service providers (names, address/telephone)
- Club memberships, volunteer activities, and senior centers (names, address/telephone)
- Landlord (name, address/telephone)

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Web: <http://www.caps4caregivers.org/>