



SENIOR SERVICES
Helping Our Elderly Live With Dignity

ELIZABETH AND TAB
WILLIAMS ADULT
DAY CENTER

MEALS-ON-WHEELS

HELP LINE

HOME CARE

LIVING-AT-HOME

SENIOR LUNCH

ELDER CARE CHOICES

Senior Services, Inc.

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CHECKLIST OF IMPORTANT PAPERS AND DOCUMENTS

It is extremely helpful to have pertinent information readily available before a health emergency or other unexpected crisis occurs. Please use this checklist as a guide to gather this important information for your self and others who may need to make decisions on your behalf. This information needs to be compiled (in a notebook or a computer file) and updated on a regular basis. The information also needs to be kept in a safe place known to people who may need to access it.

Demographic Information

- Full Name
- Address
- Previous Address (if applicable)
- Date of Birth
- County/State of Birth
- Phone/Cell Phone Numbers
- E-mail Address and Computer Passwords
- Parents' Information (including mother's maiden name)
- Child(ren) or Relatives' Contact Information

Important Papers

- Birth Certificate
- Marriage/Divorce Papers
- Social Security Card
- State ID/Driver's License
- Medicare and/or Other Health Insurance Cards
- Power of Attorney (Durable and Health Care)
- Living Will
- Will
- Prepaid Burial Information/Deed
- Vehicle Titles
- Real Estate Deeds
- Federal and State Tax Return (for the past 3 to 5 years)
- Appraisals of Personal Property/Personal Property Inventory
- Insurance Policies (company names, phone numbers, terms and benefits)
 - Life
 - Health
 - Homeowner's
 - Long Term Care
 - Automobile

Medical Information

- Names, Addresses, Phone Numbers of:
 - Doctors
 - Dentists
 - Other Medical Providers/Specialists
 - Pharmacists
- Current and Past Medical Conditions
- Allergies
- Current Medications and Dosages

Financial Information

- Financial Accounts
 - Checking
 - Savings
 - Stocks
 - Bonds
 - Investments
 - Income (Social Security, pension, disability, etc.)
 - Other Income (personal loans made to others, rental properties, etc.)
 - Business Ownership and Partnership Agreements
- A List of Debts and Routine Bills
 - Mortgage
 - Vehicle
 - Credit Card
 - Personal Loan
 - Outstanding Bills
 - Monthly Utilities
 - Insurance Premiums
 - Property Taxes
- Location of Any Hidden Valuables
- Keys (house, safety deposit boxes, post office boxes, etc.)
- Location of Safety Deposit and Post Office Boxes

Professional Advisors

- Names, Addresses, and Phone Numbers of:
 - Attorney
 - Executor of Will
 - Financial Advisor(s)
 - Accountants
 - Insurance Agents (house, vehicle, life, etc.)
 - Banker

End of Life and Memorial Wishes

- Names Addresses, and Phone Numbers of:
 - Church or Faith Based Organization
 - Funeral Home
 - Cemetery
- Personal Wishes
 - Casket
 - Cremation
 - Obituary
 - Important Historical Information (schools, military, special achievements, etc.)
 - Clothing/Jewelry
 - Music Selection
 - Pallbearers
 - Memorial Choices
 - Readings
 - Flowers