

# Worksheet: Important Documents and Paperwork



It can be helpful to store an older person's official records and legal documents together in one place so you can access them quickly when you need them. Keep these materials somewhere safe and easy to find, like a fireproof lock box. This checklist can help you figure out what information to assemble.

## Personal Records

- Personal information**, such as their Social Security number, date and place of birth, and education and military records.
- Identity documents** including Social Security card, passport, name change documentation, and a copy of their driver's license or other ID card.
- Vital records** such as birth and death certificates, and certificates of marriage, divorce, citizenship, or adoption.
- Contact information** for children, neighbors, other close family and friends, lawyers, financial advisors, and religious contacts.
- Legal documents** including advance directives, powers of attorney, trusts, and the most up-to-date will with the person's original signature.
- Health information**, such as a list of diagnoses and medications, and contact information for health care providers.
- Usernames and passwords** for online banking, bill paying, and other critical services.

## Financial Records

- Banking information**, including the name of their bank(s) and account numbers for checking, saving, money market, and other accounts. Location of safe deposit box and key.
- Assets and income**, such as pensions from their employer, Social Security, IRAs, 401(k)s, and other investment income. Include the name and contact information for any financial professionals.

**Debts and other liabilities** including loans, lines of credit, and mortgages.

**Credit and debit card** companies, authorized users, account numbers, and balances.

**Insurance information** such as Medicare, Medicaid, private health insurance, long-term care insurance, and life insurance. Include policy numbers and the name and contact information of insurance agents.

**Homeowner information** including property taxes, homeowner's insurance policies, warranties or service plans, and the original deed of trust for the home.

**Car paperwork**, including car title and registration, details of any car loans, and auto insurance policies.

**Recent income tax returns** and related documentation.

