Planning for Care: Important Documents

Here is a list of important documents you should have on hand if you are considering making plans to take care of your parents. Be sure to place them in an accessible, fire-safe, secure location.

- ❑ Property deeds/auto titles
- ❑ Burial plot deeds
- ❑ Birth certificate/adoption records
- ❑ Birth certificate of spouse
- ❑ Marriage certificates
- ❑ Divorce decrees
- ❑ Death certificates
- ❑ Military discharge
- ❑ Immigration and Naturalization Service Card (green card)
- ❑ Estate dispersion documents (attorney should know where all copies are located)
- ❑ Advance Directives (primary care physician, hospital, and individual should have copies)
- ❑ Property tax receipts
- ❑ List of routine household bills
- ❑ Copies of previous three years' tax returns
- ❑ Personal loan records
- ❑ Retirement and pension policies, including the names of beneficiaries
- ❑ Receivables
- ❑ Insurance policies
- ❑ Bank accounts, pass books
- ❑ Certificates of deposit
- ❑ Investment certificates
- ❑ Business venture interests
- ❑ Account or provision for funeral and health care

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Use a Records and Information Organizer to gather and review pertinent information such as:

- ❑ Doctors' names, addresses and phone numbers
- ❑ Prescription and non-prescription medications taken
- ❑ Drug store name and phone number
- ❑ Medicare, Medicaid or other health insurance numbers
- ❑ Important papers and where are they kept
- ❑ Banking and financial information
- ❑ Area legal and financial experts
- ❑ Social Security numbers, medical record numbers and military ID numbers
- ❑ Informal support resource names, addresses and phone numbers

Go over this information together once per year or when something changes. Consider banking co-signatures, auto bill pay, automatic deposit of all income and online banking. Set yourself and perhaps your elders up with a long distance telephone service that gives you a monthly rate, 1-800 telephone number or method to make as many long distance calls as necessary without constraint.

Include the elders in all of this.

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