

Essential Document Locator Checklist

Adult children of aging parents are often caught without the essential documents their parents need in an emergency situation. Knowing where the official records are located as well as having copies of these important financial, legal and health documents can save you thousands of dollars and countless hours of time spent tracking down records.

PHOTOCOPY ESSENTIAL DOCUMENTS

- › Copy of Birth Certificate
- › Copy of Driver's License
- › Copy of Social Security Card
- › Copy of Organ Donor Card
- › Copy of Marriage Certificate
- › Copy of Credit Cards
- › Copy of Mortgage Records
- › Copy of Military Records
- › Copy of Medicare / Medicaid / Insurance Coverage Card
- › Copy of Legal Power of Attorney, Healthcare Proxy, Living Will, Advance Directives

CREATE A LIST OF WHERE TO FIND ORIGINAL DOCUMENTS

- › Location of receipts and appraisals for valuables
- › Location of trust, banking, real estate and other investments
- › Location of living will, medical directive or durable power of attorney
- › Location of personal loans owed with substantiating documentation
- › Location of tax returns and gift or estate tax returns filed during the period
- › Location of birth certificate, social security card, marriage and divorce certificates, education and military records
- › Location of any letter of instruction listing personal property not disposed of by will, and wishes for distribution
- › Location of safe-deposit box and key with a list of the contents and names of anyone who has access to it

CREATE A LIST OF IMPORTANT CONTACTS AND ACCOUNTS

- › Name and address of clergy, if appropriate
- › Details of desired funeral arrangements; location of burial plot, if any, and deed to it
- › Complete list of beneficiaries with current addresses and telephone numbers
- › List of active credit accounts such as mortgage, banks, oil companies and department stores, including name and address of each company, account number and type
- › Name, address and telephone numbers of attorney, financial planner, tax advisor, broker, and/or anyone else with knowledge of control over trusts, wills and finances.
- › List of bank accounts, including name, address and telephone number of each financial institution, in addition to, account numbers, location of passbooks, checkbooks and certificates of deposits
- › List of insurance information including health, life, auto, homeowner and renter policies; any employee benefit or pension plans. Also include name, address and telephone number of each insurance company and agent, policy numbers, and locations