

Being Prepared: A practical guide to getting your affairs in order

As we age, it becomes increasingly necessary to keep track of important information. This is even more critical when you or a loved one is dealing with a chronic healthcare condition, a serious medical diagnosis, or a decline in functional capacity. This checklist should help you jumpstart the process of getting your affairs in order.

Personal Financial Information

- Checking Account Information: Bank name, address and account number
- Savings Account Information: Bank name, address and account number
- CDs including: Bank name, address and account number
- Brokerage Account Information: Brokerage name, address and account number
- Insurance Policies: Insurer name, address, policy type, policy number
- Pension/Retirement Account Information: Administrator name, address, account number
- Credit Card Accounts: Account issuer name, address, account number
- Safety Deposit Box: Location, address, key location, content listing
- Automatic Payments or Deductions: Listing, amounts, frequency

Personal Assets

- Real Estate Owned: Deed, last appraisal, tax statement
- Real Estate with Mortgage: Loan servicer, address, account number, mortgage balance
- Vehicles owned: Make, model, license number, title, registration
- Vehicles with loans: Make, model, license number, loan servicer, address, account number
- Valuable Personal Property (antiques art, jewelry): Appraised value, appraisal, location

Estate Planning Information

- Will: Date prepared, location
- Executor : Name, address, telephone numbers
- Trusts: Type, date prepared, location
- Powers of Attorney: Date prepared, type, location
- Attorney: Name, telephone number, address

Personal Information

- Birth Certificate
- Birth Certificate of Minor Children
- Marriage Licenses and Divorce Decrees (all)
- Immigration and Naturalization Papers
- Social Security Cards and Passports
- Tax Returns (all)
- Password Listing for All Accounts, Computers, Devices
- Military Discharge Papers including DD214

Health Care Information

- Medication List: Including Dosage and Frequency
- Health Insurance Policies: Type, Insurer name and address, policy number
- Medicare: Copy of Medicare card
- Advance Directive/Living Will: Date prepared, location
- Primary Care Physician: Name, telephone number, address

Final Arrangements

- Pre-Arranged Funeral Contract
- Cemetery Plot
- Organ Donor or Medical Research Documents
- Funeral Service Wishes

Personal Instructions

- Personal property bequests listing
- Lock combinations
- Location instructions for all information listed above



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