

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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