



David York Agency  
Home Health Care

(718) 376-7755

1416 Avenue M, Suite 301  
Brooklyn, NY 11230

**ESSENTIAL DOCUMENTS & EMERGENCY INFORMATION**

**1. Professionals List - All Contact Information for:**

**a. Doctors:**

**i. Primary Care**

**ii. Specialists**

**b. Accountant**

**c. Attorney**

**d. Financial Advisor**

**e. Insurance Brokers**

**f. Other**



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2. Important Documents Packet (Originals &/or Copies):			
	Have Original	Have Copy	Location of Document:
	✓	✓	
a. Social Security Card			
b. Birth Certificate			
c. Driver's License			
d. Marriage Certificate			
e. Divorce Certificate			
f. Passport			
g. Medicare/Medicaid/Insurance Card			
h. Military Discharge Papers			
i. Deeds			
j. Titles			
k. Tax Returns for last 6 years			
l. Instructions on Location of all files			



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**3. Medical Information:**

**a. Allergies**

**b. Medications**

**c. Treatments**

**d. Major Operations**

**e. Immunization Records**



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**4. Financial Accounts List – Include Contact Information & Account Numbers for:**

**a. Bank Accounts**

**b. Investment/Brokerage Accounts (Stocks, Bonds, CDs, Annuities)**

**c. Credit/Debit Cards**



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<b>5. Financial Assets List:</b>	<b>Describe Asset, its Location &amp; Documentation</b>
a. Car Ownership	
b. Mortgage Documents	
c. Real Estate Holdings	
d. Loans Owed or Owed to them	
e. Original Invoices for Important Possessions	
f. Partnership Documents	
g. Jewelry and Valuables	
h. Safe Combination and Directions	
i. Location of Safety Deposit Key	
j. Other Assets	



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<b>6. Sources of Income:</b>	<b>Description of Income, Account &amp; Contact Info:</b>	<b>Location of Documents:</b>
a. Annuities		
b. Social Security		
c. Pensions		
d. Annual Distributions from Retirement Accts		
e. VA Benefits		
f. Disability Payments		

**7. Insurance Policies – Include Contact Information & Policy Numbers for:**

a. Home
b. Auto
c. Health
d. Long Term Care
e. Life



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<b>8. Recurring Bills:</b>	<b>Include Company, Account &amp; Contact Information</b>
a. Mortgage	
b. Loans	
c. Utilities	
i. Telephone	
ii. Electric	
iii. Gas	
d. Insurance Premiums (annual/monthly/quarterly)	
e. Car Lease	
f. Annual Expenses (i.e. home alarm)	
g. Deliveries (i.e. newspaper, milk)	
<b>9. Computerized Information:</b>	
a. Email Accounts and Passwords	
b. Password for Computer	
c. Recurring Online Billing	



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<b>10. Estate Planning Documents:</b>	<b>Have</b>	<b>Location of Documents:</b>
a. Will		
b. Special Instructions regarding personal property		
c. Durable Power of Attorney		
d. Advanced Healthcare Directive/Living Will		
e. Healthcare Proxy		
f. Do Not Resuscitate (DNR) Order		
g. Retirement Plans		
h. Disability Plans		
i. Government Benefits for which they are eligible		

<b>11. End of Life Arrangements:</b>	<b>Have</b>	<b>Location of Documents:</b>
a. Cemetery Plot Ownership		
b. Pre-Planned Burial Papers		
c. Personal Statement regarding burial services		