



## Essential Documents & Emergency Information

David York Agency  
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Brooklyn, NY 11230  
718.376.7755

1. Professionals List - All Contact Information for:
  - a. Doctors: Primary Care and Specialists
  - b. Accountant
  - c. Attorney
  - d. Financial Advisor
  - e. Insurance Brokers
2. Important Documents Packet (Originals and/or Copies):
  - a. Social Security Card
  - b. Birth Certificate
  - c. Driver's License
  - d. Marriage Certificate
  - e. Divorce Certificate
  - f. Passport
  - g. Medical Information
    - i. Allergies
    - ii. Medications
    - iii. Treatments
    - iv. Major Operations
    - v. Immunization Records
  - h. Medicare/Medicaid/Insurance Card
  - i. Life Insurance Policies
  - j. Military Discharge Papers
  - k. Deeds
  - l. Titles
  - m. Tax Returns for last 6 years
  - n. Instructions on Location of all files
3. Financial Accounts List – All Contact Information and Account Numbers for:
  - a. Bank Accounts
  - b. Investment/Brokerage Accounts
    - i. Stocks
    - ii. Bonds
    - iii. CDs
  - c. Credit/Debit Cards
4. Financial Assets List:
  - a. Car Ownership
  - b. Mortgage Documents
  - c. Real Estate Holdings
  - d. Loans Owed or Owed to them
  - e. Tax Returns
  - f. Insurance Policies
    - i. Home
    - ii. Auto
    - iii. Health
    - iv. Long Term Care
    - v. Life
5. Sources of Income:
  - a. Annuities
  - b. Social Security
  - c. Pensions
  - d. Annual Distributions from Retirement Accounts
  - e. VA Benefits
  - f. Disability Payments
6. Recurring Bills:
  - a. Mortgage
  - b. Loans
  - c. Utilities
    - i. Telephone
    - ii. Electric
    - iii. Gas
  - d. Insurance Premiums (monthly & quarterly)
  - e. Car Lease
  - f. Annual Expenses (i.e. home alarm)
  - g. Deliveries (i.e. newspaper, milk)
7. Computerized Information:
  - a. Email Accounts and Passwords
  - b. Password for Computer
  - c. Recurring Online Billing
8. Estate Planning Documents:
  - 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. Governmental Benefits for which they are eligible
9. End of Life Arrangements:
  - a. Cemetery Plot Ownership
  - b. Pre-Planned Burial Papers
  - c. Personal Statement regarding burial services