



## Essential Documents & Emergency Information Checklist

1. Professionals List - All Contact Information for:
  - A. Doctors: Primary Care and Specialists
  - B. Accountant
  - C. Attorney
  - D. Financial Advisor
  - E. Insurance Brokers
2. Medical Information
  - A. Diagnosis
  - B. Allergies
  - C. Medications
  - D. Treatments
  - E. Major Operations
  - F. Immunizations
3. Important Documents (Originals and/or copies)
  - 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 the Last 6 Years
  - L. Instructions on Location of all Files

4. Financial Accounts - All Contact Information and Account Numbers for:
  - A. Bank Accounts
  - B. Investment / Brokerage Accounts
    - Stocks
    - Bonds
    - CDs
  - C. Credit / Debit Cards
5. 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
6. Financial Assets
  - A. Car Ownership
  - B. Mortgage Documents
  - C. Real Estate Holdings
  - D. Loans Owed or Owed to them
  - E. Tax Returns
  - F. Insurance Policies
    - Home
    - Auto
    - Health
    - Long Term Care
    - Life
  - G. Original Invoices for Important Possessions
  - H. Partnership Documents
  - I. Jewelry and Valuables
  - J. Safe Combination and Directions
  - K. Location of Safety Deposit Key

7. Insurance Policies
  - A. Home
  - B. Auto
  - C. Health
  - D. Long Term Care
  - E. Life
8. Recurring Bills:
  - A. Mortgage
  - B. Loans
  - C. Utilities
    - Telephone
    - Electric
    - Gas
  - D. Insurance Premiums (Annual/Monthly/Quarterly)
  - E. Car Lease/Payments
  - F. Annual Expenses (i.e. home alarm)
  - G. Deliveries (i.e. newspaper, milk)
9. Sources of Income
  - A. Annuities
  - B. Social Security
  - C. Pensions
  - D. Annual Distributions from Retirement Accounts
  - E. VA Benefits
  - F. Disability Payments
10. End of Life Arrangements:
  - A. Cemetery Plot Ownership
  - B. Pre-planned Burial Papers
  - C. Personal Statement Regarding Burial Services
11. Computer Information
  - A. Email Accounts and Passwords
  - B. Password for Computer
  - C. Recurring Online Billing

