

Important Documents: Planning for Care

Important Documents

Below 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.

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| <input type="checkbox"/> Burial plot deeds | <input type="checkbox"/> Insurance policies |
| <input type="checkbox"/> Birth certificate/adoption records | <input type="checkbox"/> Bank accounts, pass books |
| <input type="checkbox"/> Birth certificate of spouse | <input type="checkbox"/> Certificates of deposit |
| <input type="checkbox"/> Marriage certificates | <input type="checkbox"/> Investment certificates |
| <input type="checkbox"/> Divorce decrees | <input type="checkbox"/> Business venture interests |
| <input type="checkbox"/> Death certificates | <input type="checkbox"/> Account or provision for funeral and health care |
| <input type="checkbox"/> Military discharge | |
| <input type="checkbox"/> Immigration and Naturalization Service Card (green card) | |
| <input type="checkbox"/> Estate dispersion documents (attorney should know where all copies are located) | |
| <input type="checkbox"/> Advance directives (primary care physician, hospital, and individual should have copies) | |
| <input type="checkbox"/> Property tax receipts | |
| <input type="checkbox"/> List of routine household bills | |
| <input type="checkbox"/> Copies of previous three years' tax returns | |
| <input type="checkbox"/> Personal loan records | |
| <input type="checkbox"/> Retirement and pension policies, including the names of beneficiaries | |
| <input type="checkbox"/> Receivables | |



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Information to Keep On Hand

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.