

LIST OF IMPORTANT DOCUMENTS

When conducting legal, financial, or estate planning for your senior, you typically need a number of different legal documents. Sit down with your senior and fill out this resource so you have the information available for future planning, or in case of an emergency.

Health Insurance Policies

	WHERE TO FIND IT	NOTES/UPDATES
Primary Health Insurance		
Supplemental Medical Insurance		
Medicare Card		
Long-term Care Insurance		
Disability Insurance		
Life Insurance		
Funeral Insurance Policy		

Financial Accounts / Valuables

	WHERE TO FIND IT	NOTES/UPDATES
Safety Deposit Box and Keys		
Checkings and Savings Accounts		
Brokerage Accounts		
Stocks and Bonds		
Jewelry/Coins		
Appraisals and Inventory Lists		
Other		

Retirement & Benefit Plans

	WHERE TO FIND IT	NOTES/UPDATES
401K Plans		
Profit Sharing/Pension Plans		
IRA Accounts		
Military Benefits/Records		
Social Security Records		



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Tax Statements

	WHERE TO FIND IT	NOTES/UPDATES
Previous Year Statement		
Property Tax Statement		
Personal Property Tax		

Debt

	WHERE TO FIND IT	NOTES/UPDATES
Credit Cards		
Utility Bills		
Outstanding Loans		

Personal Legal Documents

	WHERE TO FIND IT	NOTES/UPDATES
Birth Certificate		
Social Security Card		
Passport		
Citizenship Papers		
Marriage Certificate/Divorce Records		
Power(s) of Attorney		
Will		

Other Legal Documents

	WHERE TO FIND IT	NOTES/UPDATES
Car Title		
Car Insurance		
Deed to House		
Homeowner's Insurance		
Mortgage (or Rental Lease)		
Governement Assistance		
Driver's License		



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Other Important Documents

Other Important Documents	WHERE TO FIND IT	NOTES/UPDATES

Legal and Financial Advisors

ACCOUNTANT Name:	
Address:	Phone:
ATTORNEY Name:	
Address:	Phone:
EXECUTOR/TRUSTEE Name:	
Address:	Phone:
CO-EXECUTOR/TRUSTEE Name:	
Address:	Phone:
OTHER Name:	
Address:	Phone:

Additional Comments:

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No Professional Medical Service or Advice

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