

Important Document Checklist

In planning for the future, whether it be for an aging parent, yourself, or maybe a disabled child or sibling, making sure that you “covered all the bases” can be daunting. This checklist of important documents that need to be located, discussed, and signed if need be, can help ease some of the stress in the planning. And don’t forget if you have questions along the way the ADRC is here to help!!

- Durable Power of Attorney
- Health Care Power of Attorney and Health Care Proxy
- Living Trust
- Last Will and Testament
- Living Will
- Medical Records
- Birth Certificate
- Social Security benefit/payment information
- Medicare and Medigap policy information
- Insurance policies (health, life, home, auto, etc.)
- Pension, 401(k) and other income related benefit statements
- Bank Statements
- Loan agreements
- Do Not Resuscitate Order
- Investment statements (IRAs, mutual funds, etc.)
- Stock and bond certificates and statements
- Mortgage papers
- Deeds
- Tax Records
- Tax receipts and relevant documents needed for tax filing
- State and Federal income tax returns
- Vehicle titles
- Master List of Your Assets, Liabilities
- List of Important Contacts and their information (Family, anyone named in the will, beneficiaries of the IRA, Annuity, Life Insurance, attorney, executor/trustee)

