



A Plan For Senior Care's Guide On What Documents Are Important To Keep



Having your senior loved one's important documents organized will help your family navigate through any situation. Whether you are dealing with a move to senior care and housing, illness or the stress of a natural disaster, many of these documents may be needed. Use our guide below for some ideas of what documents are important to keep. Once you have gathered the documents that apply to your senior, it is wise to keep them in one location. A binder, fire safe box, safety deposit box are some good locations. Also, make sure his/her power of attorney has a copy of the documents as well.

Financial Documents:

- Business ownership or corporation documents
- Tax returns
- Property deeds or lease agreements
- Automobile insurance, registration, and loans
- Bank account information or sources of money
- Pension, 401(k) and annuity information

- Listing of revolving debt (credit) and loans
- Stock, bond or brokerage holdings
- Power of Attorney (financial)

Estate Planning Documents:

- Trust documents

- Life insurance documents
- Organ donor information
- Will
- Phone numbers or contact list of friends and family, clergy, attorney, financial advisor, CPA
- End of life planning documents-funeral arrangements
- List of collectibles or hidden valuables

Healthcare Documents:

- Documents relating to medical history
- Authorized individual to make decisions
- Advanced health care directive or POLST
- Power of Attorney (health)
- Medical insurance documentation
- Long term care insurance information
- Medicare and Medicaid documents
- Listing of current medical providers and phone numbers

Personal Documents:

- Birth certificate
- Driver's license
- Marriage/divorce documents
- Military documents
- Safe deposit boxes & key information
- Social Security card
- Usernames and passwords (online usage)
- Documents not listed that you feel you will need in the future (this list is not inclusive of all documents)