

seniors and/or their caregivers should have in their possession. It's never too early to get these materials organized in case of an emergency.

_____ Names, addresses, phone numbers of: •Doctors, dentists, pharmacists, other health care providers • lawyers, financial advisors and accountants, insurance agents, real estate agents

_____ Legal documents such as a will, amendments to the will, living will, durable power of attorney, and health care proxy

_____ Insurance policies (life, health, disability, mortgage or loan, homeowner's, accident, auto and credit cards

_____ Where are the insurance policies/other important papers located?:

_____ Business ownerships and partnership agreements • profit-sharing and pension plans • retirement accounts (IRA, Keogh, SEP, etc.)

_____ A list of debts including mortgages and other loans,

_____ A complete list of assets including: ___savings ___checking
___ money market ___ stocks ___ bonds
___ deeds to all real estate titles to automobiles, boats, and others

_____ A list of all routine household bills:

___ utilities bills
___ insurance premiums
___ credit card debts

_____ Any appraisals of personal property

_____ Copies of federal and state tax returns from the past three to five years