

Planning for Care: Important Documents

Here 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.

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



1777 N. California Blvd.
Suite 210
Walnut Creek, CA 94596

925-933-8181
serviceinquiry@hillendale.net
www.hillendale.net

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.

Include the elders in all of this.

www.helpstartshere.org