



Important Documents Every Caregiver Should Have For Their Loved One

Medical Information For Your Loved One:

- List of your loved ones medical history and medications
- List/contact information for all medical providers, dentist
- Pharmacy and mail order information
- All insurance information, including long-term care
- HIPPA documents signed
- Do-Not-Resuscitate Order (DNR) if this is your loved one's wishes
- Durable health-care power of attorney
- Living will/physician directive

Your Loved One's Estate:

- List of bank accounts/credit unions, username, and passwords
- Safe-deposit location and keys
- Deeds to housing or land that is owned, rental agreements
- Car titles
- List of 401(k) and/or IRA accounts
- List of any annuity contracts
- Other investments
- Pension documents
- Trust documents
- Your loved one's will, financial power of attorney
- Insurance information
- Tax information
- Listing of credit cards and debts
- Contact information for professionals-lawyer, accountant, insurance agent
- Dates of expiration for public benefits
- Letter of Instruction from your loved one

Other Important Items:

- Birth, death, divorce certificates
- State issued ID
- Passport, citizenship papers, social security card
- Burial information
- Veterans ID, if applicable