

Tips:

- Discuss your Advance Health Directives with your physician and loved ones.
- Put your **own** address, birthdate, SSN, and phone number(s) on your Critical Contact list
- Have one checking account accessible to someone else at time of death
- Put your utilities on auto-pay, keep the account numbers and passwords on your Critical Contact list - (don't forget your MetroCard and E-Z Pass).
- Record which payment account pays which of your bills.
- Keep current and effective insurance policies: list the policy numbers, beneficiaries, account, and phone numbers: review all coverage annually
- Record your email accounts, social media, subscriptions, all payment accounts, and passwords.
- Collect this information in an accessible three-ring binder



ESSENTIAL DOCUMENTS

Name:

Address:

Phone/Email:

Tough questions:

- How much care do you expect your family to provide before professionals take over?
- Who should take care of your pet when you cannot?
- How long should you stay in your home if you can afford it and are safe?
- How much of your assets should you spend to stay at home when your care requires more than your loved ones can provide. When should you consider an alternative living situation?"

Being connected leads to healthy aging!

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ESSENTIAL DOCUMENTS & INFORMATION		
as of date:	CHECKLIST	LOCATION
	<i>Critical Contacts: family, local neighbors, professionals</i>	
	<i>Important Service providers and phone numbers (if online, include passwords)</i>	
	<i>Information about your pets: vet and pet minders' contact information</i>	
	<i>List of all medications, allergies, and copies of Health Insurance cards</i>	
	<i>Health Proxy & Living will, include detailed advance directives</i>	
	<i>Will and Estate document; Power of Attorney</i>	
	<i>If an attorney wrote your will, put his name and <u>current</u> number on your list</i>	
	<i>List of Bank and Investment accounts (account # and password)</i>	
	<i>Copies of credit cards</i>	
	<i>Copies of identification (Social Security card, license, passport, etc.)</i>	
	<i>Insurance policies (policy # and date of most recent review)</i>	
	<i>Personal property inventory and appraisals</i>	
	<i>Property deed(s)/Vehicle title(s)</i>	
	<i>Funeral instructions with religious affiliation</i>	
	<i>Certificate(s): Birth, Marriage, Military records</i>	
	<i>Safe Deposit Box(es) and key(s)</i>	
	<i>Computer password list (create an online contact for each account)</i>	
	<i>Router ID, Password and key to computer operating system</i>	