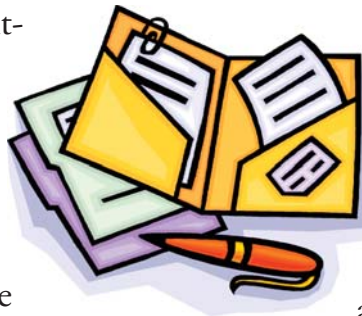


Organizing Your Personal Records and Information

- Managing Your Paperwork
- Who Should Have a Copy?
- Personal Records Inventory

Too often we need some pieces of information when we are least able to think clearly—during an emergency, a doctor’s appointment, at the lawyer’s office, or at the hospital admitting desk. So, it’s a good idea to get organized ahead of time when things are calm. But the job of finding and recording the information can still seem overwhelming!

Try using this form to guide you. Take your time; copy numbers carefully; and stop from time to time to ask yourself whether the information is current. Consider asking a



close family member or trusted friend to help you. If you are married, you and your spouse should each fill out a form.

When you’re done, *make copies*. Decide who should have a copy—a child? lawyer? trusted friend? accountant?

Things should go more smoothly the next time you or someone acting for you needs quick access to important records. And you’ll have the peace of mind that comes from having all your personal records in order.

The information contained in this form should be kept secure, and made available only to trusted family members and/or agents.

Personal Records inventory *as of* (date):

PERSONAL INFORMATION:

Name: _____

Address: _____

Phone: _____

E-Mail Address: _____

Social Security No.: _____

Drivers License No.: _____

Medicare No.: _____

Medicaid No.: _____

Armed Forces No.: _____

Religious Affiliation/Minister: _____

CHILDREN (name, address and telephone numbers): _____

OTHER CLOSE RELATIVES/FRIENDS (name, address and telephone numbers):

HEALTH CARE PROVIDERS (name and telephone numbers):

Primary care physician: _____

Physician specialists: _____

Eye doctor: _____

Dentist: _____

Long-term care or assisted living facility: _____

Hospital: _____

Home health care provider: _____

Pharmacist: _____

Other care provider(s): _____

INSURANCE INFORMATION

(company, plan, policy no., phone no.):

Health Insurance/HMO: _____

Medicare supplement: _____

Long-term care insurance: _____

Car insurance: _____

Homeowners insurance: _____

Life insurance: _____

LEGAL AND FINANCIAL:

Attorney: _____

Accountant: _____

Stock broker or investment advisor:

Bank—*Record bank and investment firm name(s), branch(es), account number(s), and signer(s):*

Checking account: _____

Savings accounts: _____

Safe deposit box: _____

Stock and bonds: _____

ESTATE PLANNING DOCUMENTS (location and date):

Will (including trust documents): _____

Living will (health care directive):

Appointment of health care representative (be sure to include the name, address, and phone no. of the person you have appointed): _____

FINANCIAL RECORDS (where kept):

Tax returns, tax information: _____

Checkbook and savings passbooks:

Pension, IRA, 401K, and other deferred compensation records: _____

Real estate documents (deeds, mortgages, notes):

Insurance policies and premium payment records:

Health care expense and reimbursement records:

Prepaid funeral plan, burial plot documents:

Other Notes and Instructions