**Essential Documents to Have In Place**

**Are your affairs in order?**

* If you became unconscious who would find you, and how long would it take?
* Would the person know who to call and what your wishes were for care?
* What documents or information do you have in place that would help them know what to do?
* Would they know where to find them?

**If you died today…**

Who would miss you?

What roles do you fill that would be missed in your home, your family and community?

Who would take over what you did?

Who would take care of your possessions?

**There are many other helpful documents listed on the next pages. But those below on this page are key if you have no other ones.**

* The more you have in place, the easier it is for you to know others will do what you want when ill or after you have died, the easier it will be for someone to step in and manage your affairs.

**The most important documents to have in place for when you are still living:**

* Power of Attorney for Health Care – A document that gives another person to make health care decision for you.
* Power of Attorney for Finances -A document that gives someone the right to manage your financial affairs while you are ill.

**The most important document have in place when you die os**

* Executor of your Estate – a person who has the right access your bank account and any possessions you leave behind and distribute your belongings and dispose of your bodily remains.

**Have on your refrigerator**

* Who to call in case of an emergency

**IMPORTANT:
Even if you have the above essential documents in order, it does no good if no one knows where they are or what they say.**

* The items above need to have a 2 people named (primary and secondary) in case one of the persons is not available. These persons need copies of the documents.
* The documents need to be reviewed at least every two years to make sure no changes are needed and to remind the people responsible of there were abouts where abouts.

**Important Documents To Have in Order**

(Not all of these are necessary for everyone. It depends on your life situation.)

* Where the documents are located. Date Last Updated/
* Who Knows where they are and The Date the person was last told.

| **Categories and Items** | * **Location**
* **Date Last Updated**
 | * **Who Knows/**
* **Date Last Told**
 |
| --- | --- | --- |
| 1. **PEOPLE LISTS**
 |  |  |
| * 1. Executor of your Estate
 |  |  |
| * 1. **Key people to call first in case of illness or death.**
 |  |  |
| * 1. People who know location of documents – last date you told them.
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| 1. **IDENTIFICATION Put together list**
 |  |  |
| * 1. Birth Certificate, Marriage Certificate
 |  |  |
| * 1. Marriage Certificate, Divorce Decree
 |  |  |
| * 1. Social Security Card
 |  |  |
| * 1. Driver’s License or Identification
 |  |  |
| * 1. Medicare Card, Supplemental Insurance Card
 |  |  |
| * 1. Diploma or School Transcripts
 |  |  |
| 1. **LEGAL DOCUMENTS May or may not need a lawyer. Differ state to state.**
 |  |  |
| * 1. Will \*
 |  |  |
| * 1. **Durable Powers of Attorney**
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| * + 1. Financial
 |  |  |
| * + 1. Health Care
 |  |  |
| * + 1. Health Care Directive (Advance Directive)
 |  |  |
| * + 1. HIPPAA Authorization for access to Medical Information.
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| * 1. Community Property Agreement
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| 1. **BANKING AND FINANCIAL INFORMATION**
 |  |  |
| * 1. Safe Deposit Box, Key, and Contents List
 |  |  |
| * 1. INCOME SOURCES
 |  |  |
| Social Security, Pensions, Stocks etc |  |  |
| * 1. **ASSETS**
 |  |  |
| * + 1. Bank Statements, Two Stocks, Insurance
 |  |  |
| * + 1. Funeral Arrangements – Prepaid?
 |  |  |
| * + 1. Real Estate Values, Land Rights, Vehicles
 |  |  |
| * + 1. Deeds to Property /House/Vehicles
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| * 1. **DEBTS**
 |  |  |
| * + 1. Mortgage Statement with bank
 |  |  |
| * + 1. Credit Cards (even if zero balance)
 |  |  |
| * 1. **EXPENSES**
 |  |  |
| * + 1. All Bills List with who and how paid
 |  |  |
| 1. **MEDICAL INFORMATION**
 |  |  |
| * 1. Medical Summary
 |  |  |
| * 1. POLST
 |  |  |
| * 1. Insurance Policies Accidental death/Life ins.
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| 1. **DIGITAL- LOGINS**
 |  |  |
| * 1. Phone access
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| * 1. List of passwords e.g. for auto payments or other items on devices?
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