

## DOCUMENTS FOR CAREGIVING BINDER

*The following is a suggested checklist of items you or your loved one should gather and place in a binder that can easily be found by family members.*

- Names, addresses, phone numbers of:
  - Doctors, dentist, pharmacist, home health aides, and other medical providers, and suppliers
  - Lawyers, financial advisers, accountants, and insurance agents
  - Banks, investment firms and other financial institutions
  - Clergy members or religious organizations
  - Relatives, close friends, caregivers, and neighbors
- Medical history
  - Illnesses
  - Medications
  - Surgeries/treatments
  - Allergies
  - Immunizations
- Certificates of:
  - Birth
  - Marriage
  - Divorce
  - Separation
  - Citizenship
- Military/Veteran papers
- Driver's license and/or passport
- Will and any codicils (amendments)
- Durable Power of Attorney
- Living will and Powers of Attorney for healthcare and finances

Behavioral Health Services  
Employee Assistance Program  
**YOUR ROADMAP TO CAREGIVING:  
BEING THERE FOR ADULT LOVED ONES**

— Keys/Codes to:

- House
  - Alarm systems
  - Door locks
- Garage/shed
- Safes

- Storage unit
- Vehicles and equipment
- Safety deposit box
- Post office box

— Insurance policies

- Life
- Health
  - Medical
  - Dental
- Vision
- Specific conditions

- Disability
- Long-term care
- Homeowner's
- Vehicle

— ID Cards

- Social Security
- Medicare
- Medicaid
- Private insurance

— List of employers with dates and terms of employment

— Business contracts or rental agreements

— Deeds/Titles to:

- House
- Real estate
- Vehicles and equipment
- Boats and trailers

## YOUR ROADMAP TO CAREGIVING: BEING THERE FOR ADULT LOVED ONES

- Locations of valuables
- List of charge, debit, banking cards
- Passwords, access codes, PINs
- Automatic bill-paying or electronic transfer arrangements
- Appraisals of personal property
- Copies of federal and state tax returns from the past 5 years
- Receipts from property taxes and other large recent payments
- Burial and funeral instructions, if any
- Monthly bills
- Assets:
  - Savings, checking, money market, retirement accounts
  - Stocks, bonds, 401K
  - Real estate
  - Vehicles, boats, and other valuables
  - Business ownerships and partnerships agreements
  - Profit-sharing and pension plans
  - Trust agreements
  - All debts:
    - Mortgages
    - Vehicles
    - Credit cards
    - Outstanding bills/loans
    - Other liabilities