



Are You Prepared?

Life's emergency situations require advance preparation and planning. Being prepared will help you avoid the trauma, expense and inconvenience of looking for critical documents under stressful emergency situations.

The first step is to organize your papers:

- Do you have an appropriate place for each document?
- Have you told anyone else where you keep your vital information?
- Have you shared your wishes in the event of your death?

Take action now to avoid financial problems later. The following **Personal Documents Log** has been designed to help you gather vital information in the form of papers, documents, policies, etc., and communicate their location to appropriate family members or friends.

Before getting started, remember the following tips:

- Always store original documents in a safe location that is accessible day and night, seven days a week.
- Make sure key family members and advisors have copies of this information and related documents.
- Review your **Personal Documents Log** every three to six months for possible revisions and updates.

Resource: Loverde, Joy. The Complete Eldercare Planner, Updated and Revised, 2009, Random House.

PIN NUMBERS / ACCESS CODES

- Bank by phone _____
- Bank online _____
- Debit cards _____
- Cash _____

Telephone voice mail _____

Cell phone _____

Personal Digital Assistant (PDA) _____

Property _____

COMPUTER & INTERNET USAGE

Computer access password _____

Wireless security code _____

Email address _____

Email access code _____

Important web sites & passwords _____

Location of CD ROMs & flash drive backup files _____

PERSONAL BANK ACCOUNTS

Bank _____

Telephone _____

Account name and number _____

Names on account _____

Type of account _____

Location of account documents _____

Second signature _____

Power of attorney _____

(Personal Documents Log Continued)

AUTOMATIC BILL PAYING

Name of store and service _____

Contact name _____

Telephone _____

Date payment deducted _____

Bank and account number _____

Name of store/service _____

Contact name _____

Telephone _____

Date payment deducted _____

Bank and account number _____

ELECTRONIC FUNDS TRANSFER ACCOUNT (ETA)

Account name and number _____

Names on account _____

Bank _____

Telephone _____

PERSONAL LOAN

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Type of loan _____

Location of loan papers _____

OUTSTANDING LIEN AGAINST PROPERTY

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Location of loan papers _____

PAID LIENS AGAINST PROPERTY

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Location of proof of payment papers _____

INSTALLMENT LOAN

Name(s) on loan _____

Loan number _____

Bank _____

Telephone _____

Location of loan papers _____

BUSINESS BANK ACCOUNT

Bank _____

Telephone _____

Location of account documents _____

Business name on account _____

Account number _____

Type of account _____

Second signature _____

Power of attorney _____

BUSINESS LOAN

Name(s) on loan _____

Loan number _____

Type of loan _____

Bank _____

Telephone _____

Location of loan papers _____

(Personal Documents Log Continued)

CREDIT UNION

Union name _____

Telephone _____

Name on account(s) _____

Type of account(s) _____

Account number(s) _____

Location of documents _____

FOREIGN BANK ACCOUNT

Name(s) on account _____

Account number _____

Type of account _____

Bank _____

Telephone _____

Location of account papers _____

COMPANY PENSION

Name on pension _____

Reference number _____

Dates of employment _____

Company name _____

Telephone _____

Location of pension papers _____

RETIREMENT ACCOUNT

Name on account _____

Account reference number _____

Type of account _____

Bank _____

Telephone _____

Location of account documents _____

SAVINGS CERTIFICATE

Depositor _____

Certificate number _____

Bank _____

Telephone _____

Location of certificate _____

SAVINGS BOND

Bond held by _____

Type of bond _____

Bond series number _____

Location of bond _____

STOCK CERTIFICATE

Stockholder(s) _____

Stock name _____

Stock number _____

Broker _____

Telephone _____

Location of stock documents _____

SAFE-DEPOSIT BOX

Box holder _____

People with access to box _____

Telephone number _____

Box number _____

Bank _____

Telephone _____

Key location _____

CASH-ON-HAND

Location _____

HOME SAFE

People with access to safe _____

Telephone _____

Location of combination or key _____

BUSINESS SAFE

People with access to safe _____

Telephone _____

Telephone _____

Location of combination or key _____

(Personal Documents Log Continued)

WILL

Will of _____
Attorney _____
Telephone _____
Location of original will papers _____
People with copies of will papers _____
Telephone _____

TRUST

Established by _____
Trust for _____
Attorney _____
Telephone _____
Location of original trust papers _____
People with copies of trust papers _____

LIVING WILL

Will of _____
Attorney _____
Telephone _____
Location of original living will _____
People with copies of living will _____
Telephone _____

POWER OF ATTORNEY FOR PROPERTY

Given to _____
Telephone _____
Attorney _____
Telephone _____
Location of original document _____
People with copy of papers _____

POWER OF ATTORNEY FOR HEALTH CARE

Location of original document _____
People with copies of the document _____
Agent _____

Telephone _____

LETTERS OF INSTRUCTION

Written by _____
Location of original documents _____
Telephone _____
People with copies of documents _____
Telephone _____

FUNERAL INSTRUCTIONS / MEMORIAL SERVICES

Arranged by _____
Funeral home _____
Telephone _____
Location of instruction papers _____
People with copies of instructions _____
Telephone _____

DONOR ARRANGEMENT

Location of documentation _____

AUTOPSY PERMISSION

Location of documentation _____

SOCIAL SECURITY

Social Security number _____
Location of Social Security card _____

MILITARY DISCHARGE PAPERS

Veteran name _____
Service number _____
Location of discharge papers _____

INCOME TAX FILINGS

Name of taxpayer _____
Tax identification number _____
Tax adviser _____
Telephone _____
Location of tax records _____

(Personal Documents Log Continued)

PASSPORT

Name on passport _____

Passport number _____

Location of passport _____

DRIVER'S LICENSE

Name on license _____

License number _____

State license issued _____

License renewal date _____

CREDIT CARDS / CHARGE ACCOUNTS

Account name _____

Account number _____

Name on account _____

Location of card _____

MEDICARE

Name _____

Number _____

Effective date _____

MEDICAID

Name _____

Number _____

Effective date _____

HEALTH CARE INSURANCE

Subscriber's name _____

Contract number _____

Group number _____

Insurance company _____

Telephone _____

LONG-TERM CARE INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

LIFE INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

Name on annuity _____

Insurance company _____

Contract number _____

Location of papers _____

DISABILITY INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

HOMEOWNER'S INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

REAL ESTATE INVESTMENT INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

(Personal Documents Log Continued)

Location of policy _____

RENTER'S INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

BUSINESS INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

LIABILITY INSURANCE

Name on policy _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

VEHICLE INSURANCE

Policy holder _____

Vehicle insured _____

Vehicle registration number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of title _____

VEHICLE

Vehicle _____

Make and model _____

Serial number _____

Where purchased _____

Telephone _____

Name on title _____

Location of title papers _____

Location of electronic toll collection system _____

VALUABLES INSURANCE

Policy holder _____

Item insured _____

Policy number _____

Insurance company _____

Insurance agent _____

Telephone _____

Location of policy _____

REAL ESTATE OWNERSHIP DOCUMENTS

Property address _____

Owner _____

Telephone _____

Co-owner _____

Telephone _____

Bank or mortgage company _____

Telephone _____

Location of documents _____

CEMETERY PLOT

Owner _____

Plot intended for _____

Cemetery _____

Plot location _____

Telephone _____

Location of plot deeds _____

SUBSCRIPTIONS

Name of publication _____

Sent to _____

Name of publication _____

Sent to _____

Name of publication _____

Sent to _____

(Personal Documents Log Continued)

CLUB MEMBERSHIPS

Organization _____

Telephone _____

Organization _____

Telephone _____

MEMBERSHIP / SMART CARDS

Account name _____

Account number _____

Name on account _____

Location of card _____

RELIGIOUS AFFILIATION

Place of worship _____

Address _____

Clergy person _____

Telephone _____

Documentation of special instructions _____

RELIGIOUS RITES AND CEREMONIES

Event _____

Event date _____

Place of event _____

Records storage location _____

ITEMS IN STORAGE

Stored in name of _____

What is being stored _____

Storage company _____

Telephone _____

Location of storage documents _____

ITEMS — REPAIRED/RESTORED/CLEANED

Item owner _____

Item description _____

Shop name _____

Telephone _____

Claim ticket location _____

ITEMS BORROWED

Item description _____

Lent to _____

Telephone _____

ITEMS ON ORDER

Ordered for _____

Item description _____

Order reference number _____

Shop name _____

Telephone _____

Expected order date _____

PERSONAL CONTRACTS/AGREEMENTS

Names on contract _____

Telephone _____

Nature of agreement _____

Location of paperwork _____

MEDICAL HISTORY

History of _____

Birth date _____

Location of records _____

BIRTH RECORD

Name at birth _____

Birth date _____

Place of birth _____

Birth certificate location _____

ADOPTION PAPERS

Adoption name _____

Adopted by _____

State of adoption _____

Adoption agency _____

Telephone _____

Location of paperwork _____

(Personal Documents Log Continued)

NATURALIZATION PAPERS

Citizen name _____

Place of naturalization _____

Location of papers _____

MARRIAGE LICENSE

Names on license _____

Marriage date _____

State license issued _____

License location _____

DIVORCE DECREE

Names on decree _____

Divorce date _____

State divorce granted _____

Decree location _____

SCHOOL RECORDS

Student name _____

School _____

School location _____

Telephone _____

Dates attended _____

Graduation date _____

Diploma location _____

EMPLOYMENT HISTORY

Employee name _____

Dates of employment _____

Company _____

Company address _____

Telephone _____

MOTHER'S HISTORY

Mother's name at birth _____

Date of birth _____

Place of birth _____

Birth certificate location _____

Mother's name at death _____

Cause of death _____

Date of death _____

Location of death _____

Burial location _____

Death certificate location _____

FATHER'S HISTORY

Father's name at birth _____

Date of birth _____

Place of birth _____

Birth certificate location _____

Father's name at death _____

Cause of death _____

Date of death _____

Location of death _____

Burial location _____

Death certificate location _____

DEPENDENTS

Name _____

Date of birth _____

Location of birth certificate _____

GROWN CHILDREN — NO LONGER DEPENDENTS

Name _____

Date of birth _____

Address _____

City/State/Zip _____

Telephone _____

PETS

Name of pet _____

Breed _____

Date of birth _____

Sex _____

Animal hospital _____

Telephone _____

Breeder _____

(Personal Documents Log Continued)

HOME INVENTORY

(fixtures, furniture, equipment, appliances)

Item description _____

Model number _____

Purchase price _____

Value of item today _____

Location of receipt _____

Location of warranty _____

Location of item instructions _____

Is promised to _____

PERSONAL ITEMS INVENTORY

(clothes, books, photos, mementos)

Item description _____

Purchase price _____

Value of item today _____

Location of receipt _____

Is promised to _____

VALUABLES INVENTORY

(collections, jewelry, artwork, antiques)

Item description _____

Serial number _____

Purchase price _____

Value of item today _____

Location of receipt _____

Is promised to _____

BUSINESS INVENTORY

(fixtures, furniture, equipment, appliances)

Item description _____

Model number _____

Purchase price _____

Value of item today _____

Location of receipt _____

Location of warranty _____

Location of item instructions _____

Is promised to _____

