

Catholic Caregivers

'Caregiving is pro-life!'

A Legal and Financial Paperwork Checklist

What paperwork and/or information do you need, and where is it kept? Everyone's situation will be unique. Here is a list of information that may be relevant to your loved one's circumstances. Be sure to take notes as you find information. Don't depend on your memory.

Questions to Ask

1. Does my parent have and/or need this item?
2. Where is it?

Record the company name, address, phone numbers, Web site, e-mail address, and contact person, if appropriate.

Banks

- Account numbers of all bank accounts
- Safety deposit box (Make sure you or someone else also has access to the box so that the material can be easily accessed if your parent is incapacitated or has died.)

Financial Assets

- Recent tax returns
- Savings bonds
- CDs
- IRAs
- Stock certificates
- Investment accounts
- 401(k), pension, company stock
- Accountant and/or financial planner

Property

- Automobile title and registration
- Inventory of possessions
- Deeds of real estate and/or mortgage
- Deed for cemetery plot

Insurance Policies

- Life (There may be more than one policy.)
- Disability
- Homeowner
- Renter
- Automobile
- Medical, vision, and/or dental
- Long-term health care

Identification

- Social Security card
- Marriage certificate and/or divorce certificate
- Military discharge documentation, branch of service, military ID, dates of service
- Birth certificate

- Passport and/or citizenship card
- Medicare and/or Medicaid card
- Private health insurance card

Legal

- Named of current attorney
- Will
- Durable power of attorney for finances and property
- Guardianship documents
- Trust fund arrangement

Health

- Medical coverage and ID number
- Advance directive for health care
- Living will
- Durable power of attorney for health care
- Do Not Resuscitate order
- Organ donor card
- Primary physician
- Dentist
- Physical therapist
- Other health-care providers

Debts

- Credit card information, including companies, account numbers, and recent statements
- Loans information

Parish

- Name, phone number, and location
- Priest
- Extraordinary minister of the Eucharist (if one visits your parent)

Final Details

- Funeral plans
- Funeral home
- Burial arrangement
- Cemetery information

Support

- Social service agencies involved
- Visiting nurse
- In-home assistant
- Case manager

From *A Catholic Guide to Caring for Your Aging Parent* by Monica Dodds (Loyola Press).

For more free information, visit YourAgingParent.com, a program of the Friends of St. John the Caregiver; call 1-800-392-JOHN (5646); or write FSJC, P.O. Box 320, Mountlake Terrace, WA 98043.

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