



IMPORTANT DOCUMENTS CHECKLIST

Completed for: _____ Date: _____

Every person 18 and older should have the following three documents in place:

Document	Description	Date Complete
Durable Power of Attorney	Gives authority for a third party to administrate one's affairs	
Health Care Directive/ Living Will	Expresses preferences for medical care and designates someone to make decisions and speak on one's behalf when the person is incapacitated	
Will	Spells out one's wishes after death including care of children and distribution of assets	

Optional:

Document	Description	Date Complete	N/A
Trust	Provides legal protection for the trustor's assets, set up by an attorney.		<input type="checkbox"/>

Location of important documents:

Document	Location	N/A
Legal Documents (Power of Attorney, Wills, etc.)		<input type="checkbox"/>
Home Title(s)		<input type="checkbox"/>
Vehicle Title(s)		<input type="checkbox"/>
Life Insurance Policies		<input type="checkbox"/>
Funeral Plans		<input type="checkbox"/>
List of important people: attorney, insurance agent, work, advisors, etc.		<input type="checkbox"/>
List of periodic bills		<input type="checkbox"/>

Document	Location	N/A
List of all income sources and contact information		<input type="checkbox"/>
List of property or gifts not included in wills		<input type="checkbox"/>
List of people to notify with phone numbers and addresses		<input type="checkbox"/>
List of passwords for computers and important websites		<input type="checkbox"/>
Military Documents		<input type="checkbox"/>
Taxes from 3 previous years		<input type="checkbox"/>
Other: _____		<input type="checkbox"/>
Other: _____		<input type="checkbox"/>
Other: _____		<input type="checkbox"/>

Further Information

VISIT NANCYPOLAND.COM FOR ADDITIONAL CAREGIVER RESOURCES.