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## Documents to Compile

Put these items in a binder with dividers for easy reference.

### **PERSONAL & IMMEDIATE INFORMATION**

- Personal info – Name, address, phone
- Living Will/Advance Directives
- POA – Healthcare & Financial
- Medicare card
- Medicare supplemental insurance card
- Other insurance coverage
- List of children, address, phone
- Notice is wears glasses, false teeth or hearing aid so that it is not lost
- Guardianship papers if applicable

### **MEDICAL**

- Medical History/Conditions
- List of medications
- Allergies
- Primary Physician & Specialist
- Dentist
- Eye Drr., Podiatrist, Audiologist
- Pharmacy

### **DOCUMENTS**

- Social Security card
- Birth certificate
- Marriage License
- Death Certificate of spouse
- Divorce papers if applicable
- Discharge Papers (DD214) – copies can be requested through [va.gov](http://va.gov)
- Copy of Will

**FINANCIAL** – Medicaid reviews the past five years

- Current bank statements/bank accts & locations
- All CDs, 401K, stocks, bonds or other investments
- Deed to any property
- Title to any vehicles
- Burial Trust
- Living Trust
- Social Security Income
- Retirement Income
- Other Income
- Mortgage
- Credit Cards
- Loans
- Safe deposit box & keys Location: \_\_\_\_\_
- Tax Returns (5 years)

**INSURANCE**

- Life Insurance policies
- Car insurance
- Medicare supplement
- Health insurance
- Accident
- Homeowners/Renters
- Disability
- Liability
- Agent/phone \_\_\_\_\_

**PROFESSIONAL ADVISORS**, Address, Phone

- Attorney - \_\_\_\_\_
- Executor of Will - \_\_\_\_\_
- Stock Broker - \_\_\_\_\_
- Accountant - \_\_\_\_\_
- Financial Advisor - \_\_\_\_\_
- Bank - \_\_\_\_\_
- Insurance Agent - \_\_\_\_\_