The lists and information below is a compilation taken from a MAP outline from At Home Chesapeake and a pamphlet by Susan Lapp with some additions due to the increasing use of online services.

Document and Adviser lists should be updated regularly, at least annually. Any list is useless unless key people know where this list and the documents mentioned are located. Post the location of this list on the inside of a cabinet or on your refrigerator and be sure that a key person or persons know where it is located. Specify on the list where documents are located, i.e. safety deposit box, file cabinet, fireproof box or other location and where relevant who has access. Ignore documents that are not relevant. Where there are other docs or contacts that also seem relevant, please add them. If you carry a suggested document, i.e. Driver’s License, SS Card, credit card, in a purse or wallet, make a Photostat of it and specify the location of that copy. Where you keep information electronically make sure that a key person or persons have access. List how to obtain access to information that is held electronically here or who has that information.

**Identifying Information**

Name:

Address:

Phone Numbers: Home:

Cell:

Social Security #:

Medicare#:

**Emergency Names & Numbers**

Neighbors, friends, relatives who have key to dwelling:

Spouse:

Children:

Relatives /Contacts:

Medical professionals (Drs., Dentists, Other Practitioners):

Hospital:

Medical Conditions including restrictions and allergies:

**Legal (note where located, or not available, or not applicable)**

Birth Certificate:

Passports:

Social Security Card:

Divorce Papers:

Marriage Certificate:

Durable Power of Attorney for Health Care Purposes:

Durable Power of Financial Purposes:

Living Will:

Responsible person stated in Living Will:

DNR:

Safety Deposit Box and key:

Home Deed:

Deed to other property:

Lease or Rental Agreement:

Homeowner Insurance:

Mortgage:

Loans:

Burial Plot:

Executor of Will:

Will:

Funeral Instructions and Documents:

**Financial (Note Name, contact information, and/or location of documents, or not available, or not applicable)**

Checkbooks:

Accountant:

Financial Planner:

Tax preparer:

Bills that you pay online:

Brokerage Firm or independent investments:

Checking Accounts:

Income taxes – Current:

Income Taxes – last 5 years:

IRA/401k/403b:

Pension:

Savings Accounts:

Stocks, Bonds, Trusts:

Utilities:

**Insurance (Note location of documents, or not available , or not applicable)**

Accidental Death:

Auto:

Dental:

Disability:

Health:

Life:

Long Term Care:

Major Medical/Catastrophic:

Medicare:

Medicare Supplemental:

Other:

**Personal Items**

Appraisals and/or sales receipts for Valuables:

Credit Cards, List and Photostat copies:

Information re Duties/Bills/Care you provide for others:

Jewelry:

**Miscellaneous/Home Maintenance**

Electrician:

HVAC Person:

Handyman:

Plumber:

Warranties & Equipment Brochures:

**Computer and other electronics**

Laptop Computer:

Email w. codes:

Tablet:

Online Banking:

Bill Paying:

Facebook:

Other: