Essential Documents Checklist

Check off what exists, note where it's kept, and who has a copy.

Legal Documents

- [ ] Will and/or trust
- [ ] Durable financial power of attorney
- [ ] Healthcare power of attorney
- [ ] Living will / advance directive
- [ ] DNR order, if applicable

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» Check the date: documents over 5-10 years old may need review.

» Ask an Ohio elder law attorney if documents meet current Ohio requirements.

Financial Records

- [ ] Bank, retirement and investment accounts
- [ ] Monthly bills and automatic payments
- [ ] Recent tax returns
- [ ] Deeds, titles and loan documents

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» Make a one-page list of accounts and contacts (no passwords on paper copies).

» Ask banks how to add a trusted contact or POA to accounts.

Insurance Policies

- [ ] Medicare, supplement / Advantage and Part D cards
- [ ] Long-term care insurance policy
- [ ] Life, home and auto insurance

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» Read the long-term care policy's elimination period and daily benefit.

» Review Medicare plan options every fall during open enrollment.

Personal Information

- [ ] Birth certificate, Social Security card, ID
- [ ] Marriage / divorce papers
- [ ] Military discharge papers (DD-214)

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» The DD-214 is required for VA benefits; request a copy from the National Archives if missing.

» Store originals in a fire-safe box.

Medical Records

- [ ] Medication list and allergies
- [ ] Doctor list and patient portal access
- [ ] HIPAA release forms

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» Ask each doctor's office for their HIPAA release form.

» Keep copies of recent test results and discharge papers.

Digital & Access Info

- [ ] Phone and computer access
- [ ] Email and online accounts
- [ ] Safe deposit box location and key

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» Use a password manager with emergency access for a trusted person.

» Note who should close social media accounts if needed.

Notes