

IMPORTANT DOCUMENTS TO HAVE

It is extremely important that you have the right documents for your loved one BEFORE you need them. That means that even if your loved one is doing well right now it is a good time to make sure all of these documents are ready to go when you need them. Anything can happen at any time and you will need them for just about everything.

**POWER OF ATTORNEY FOR HEALTH AND FINANCIAL AFFAIRS**

This document is the one that allows you to make decisions for your loved one when they can’t and to be able to access private information, consult with doctors and hospitals as well as access financial information. Usually these are two different documents. One for healthcare and one for finances. It must be signed and dated by the correct people, notarized and be a complete power of attorney document. You should always have an attorney review any documents like this so that you are positive you will have no issues when you have to present them to someone.

You can get this type of document from a variety of websites online where you fill in the names and personal information as well as any specific information and just print and have them signed and notarized. Make sure that you use a reputable website and that you have the documents reviewed. There are some websites you can use that are free so make sure to look at a few different ones before you make a decision.

**HEALTH HISTORY & CURRENT MEDICATIONS**

Having health history and all prescription medications written out so that you can easily access them is important. You want to be able to give copies to a doctor, hospital and the senior living facility you decide on. It makes things accurate and very easy for you when needed.

**CURRENT DOCTOR, PHARMACY AND HOSPITAL CONTACT INFORMATION**

Have all the doctors and dentist addresses and phone numbers written out. You can also list a particular hospital you want for emergency care depending on what it is. This is great when the facility asks for it and/or for example when you are asking a facility to take your mom or dad to a doctor appointment. You do not have to look it up or scramble for it.

**ALL FINANCIAL BANK ACCOUNT NUMBERS AND CONTACT INFORMATION**

Make sure you have all the banks contact information and each account with the number clearly stated. This includes retirement accounts and any other investments. It may or may not be important for you to have added yourself onto a loved ones account so that you can access money when needed. If this is not needed now but may be later you will need the power of attorney to change that so make sure you have it.

**CREDIT CARDS AND LOAN DEBT**

Make sure you have all documents for loans and all credit cards with their numbers and balances if any.

**PERSONAL PROPERTY**

Make sure you know what property is still out there for your loved one. Make sure you have any deeds to property or titles to cars or other vehicles. Have appraisals for jewelry or any other items. This way you won’t be searching for things you need later. In many scenarios most of these items are gone already but often times they are not.

**VETERANS BENEFITS & MILITARY RECORDS**

If you have any policies or documents from the Veterans Department or military make sure they are ready when needed.

**MEDICARE AND HEALTH INSURANCE**

Make sure you have copies of Medicare card, drivers license and any other supplementary insurance plans. You may have disability insurance or long term care, etc. Have copies in case you need to refer to them.

**ADVANCE MEDICAL DIRECTIVE**

If one has been made make sure you have it. If there is not one already it is extremely important to get one. It can be very difficult when something suddenly happens without warning. Make sure you have it in writing so nobody has to make a decision they aren’t sure about. This should specifically describe your loved ones wishes if a medical issue should arise.

**BURIAL AND FUNERAL PRE-PLANNING**

If anything has been paid for in advance make sure you have these documents and understand them.

**SOCIAL SECURITY**

Make sure you know when and how it comes to your loved one. Is it a check or direct deposit. A power of attorney form will **NOT** work with social security. If you want to be able to assist with an problems or issues with payment you will need to apply to social security for a special form that allows you to access your loved ones social security information.

**TAX RETURNS**

Make sure you have access to prior tax returns in case you need them for anything and in case you need the information from them to file a future year.