

## A Checklist for Aging Relatives

### Information for Family Members and Identified Representatives

Medical	Name	Contact #	Address	Location of Documentation
Primary Care Doctor				
Specialist				
Specialist				
Eye Doctor				

Medical Power of Attorney				
Do not resuscitate (DNR)				
Power of Attorney contact info				

Legal				
Living Will				
Estate Attorney				
Will/Trust Documents				

Power of Attorney				
Trustee				
Personal Representative				
Corporate Attorney				

Administrative/ Financial	Name	Contact #	Address	Location of Documentation
Medical insurance				
Benefits - Company				
-Pension; medical				
-401(k); Equity				
CPA				
Investment Manager				
-Trust Account				
- Investment Account				
-IRA				
-LLC				
Insurance Agent - Life				
Insurance Agent – P&C				

Utilities				
Subscriptions				
Internet provider				
Cell Phone provider				
Gas/Electric				
Life-Line Service				

Personal Misc	Name	Contact #	Address	Location of Documentation
Home Care Provider				
Family Contact				
Family Contact				
Personal contact – VIP				
House Cleaning Service				
Visiting Angels				
Gardener				
HOA Association				
Home Meal Delivery				

Additional Items				
Social Security Number				
Blood type				
List of medications				
Local Hospital				
Bank Information				
Credit Card List				