

Essential information

Most of this sensitive information can be kept securely in a lock box or with your Power-of-Attorney or Substitute Decision Maker.

1. Full legal name and residence
2. Birth date and place, birth certificate
3. Marriage certificate
4. Emergency contacts/family contact information
5. Social Security number
6. Employer(s) and dates of employment
7. Education and military records
8. Veterans benefits, Veteran Number
9. Sources of income and assets; investment income (stocks, bonds, property)

10. Insurance policies, bank accounts, deeds, investments, and other valuables
11. Most recent income tax return
12. Money owed, to whom, and when payments are due
13. Credit card account names and numbers
14. Safe deposit box key and information
15. Lawyer, financial advisor contact information
16. Will, beneficiary information
17. Power of attorney
18. Advance Directive/Living will/personal directive or durable power of attorney for health care
19. Where cash or other valuables might be kept in the home
20. Pharmacist, pharmacy contact information
21. List of medications
22. Physician and specialists contact information
23. Medical file/information
24. Funeral Arrangements (Where, Contact Persons)
25. Passwords (computer, banking, etc.)
26. Vial of Life

*You viewed this article on the Caregivers Nova Scotia website www.CaregiversNS.org. For more information, contact us toll-free at 1.877.488.733.