

Gathering key information

With the help of your elder, you can create a form like the one below to help identify and record important legal and financial matters. You should share this information with at least one other trusted family member, or at least ensure that he or she knows where to find it.

LEGAL

Law firm: _____
Attorney: _____ Phone: _____
Reason for contact: _____
Date of last contact: _____ Location of documents: _____
Notes: _____

FINANCIAL

1. Name of company: _____

Account type: Savings Checking IRA CD Money market
 Stock/mutual fund Loan Other _____
Account number: _____ Papers located: _____

2. Name of company: _____

Account type: Savings Checking IRA CD Money market
 Stock/mutual fund Loan Other _____
Account number: _____ Papers located: _____

If an elder has numerous accounts, it may be beneficial to consolidate them. Contact your financial adviser for more information.

INSURANCE

1. Name of company: _____

Policy type: Health Home Life Long-term care
 Other _____
Policy number: _____ Policy located: _____
Premium amount/ due: _____

2. Name of company: _____

Policy type: Health Home Life Long-term care
 Other _____
Policy number: _____ Policy located: _____
Premium amount/ due: _____

Add more as needed.