

Get Your Affairs in Order

Having important documents organized and easily accessible in a single location will bring you peace of mind, ensure your wishes are respected, and alleviate the burden on your loved ones. Here are some steps you should take:

1 PLAN FOR YOUR ESTATE AND FINANCES

Prepare a will or trust. Name a durable power of attorney for finances. Create a living trust with a trustee.

2 PLAN FOR YOUR FUTURE HEALTH CARE

Complete your advance directives including a living will and a DPOA for health care.

3 Put your important papers and copies of legal documents in one safe place.

4 Tell someone you know and trust or a lawyer where to find your important papers.

5 Talk to your loved ones and a doctor about advance care planning.

6 Give permission in advance for a doctor or lawyer to talk with your family caregiver, as needed.

7 Review your plans regularly – at least once per year or when any major life event occurs.

Which documents do you need to have in one safe place?

PERSONAL INFORMATION

1. Full legal name
2. Social Security number
3. Legal residence
4. Date and place of birth
5. Names and addresses of spouse and children

6. Birth, death, and other certificates (marriage, divorce, citizenship, and adoption)
7. Employers and dates of employment
8. Education and military records
9. Names and phone numbers of close friends, relatives, doctors, lawyers, and advisors

FINANCIAL INFORMATION

1. Sources of income and assets
2. Names of your banks and account numbers
3. Investment accounts and advisor names and phone numbers
4. Original deed of trust for home
5. Car title and registration
6. Liabilities — what is owed, to whom, and payment due dates
7. Mortgages and debts
8. Credit and debit card information
9. Most recent income tax return
10. Social Security information

11. Insurance information (life, long-term care, home, car)
12. Current will with original signatures
13. Location of safe deposit box and key

HEALTH INFORMATION

1. Current prescriptions
2. Living will and DPOA for healthcare
3. Copies of any medical orders (DNR's or POLST)
4. Health insurance info with policy and phone numbers



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