



LIFE KEEPING,
NOT JUST BOOKKEEPING®

Document Checklist

Gather important documents and information and store them in a secure place in the home, but be sure that those who need access know where to find them.

Checklist:

- Social Security number
- Health Insurance cards (Medicare, Secondary, Prescription)
- Veteran's Administration Information
- Driver's license numbers
- Insurance policies
 - Property
 - Long Term Care Insurance
 - Catastrophic Insurance
 - Life Insurance
- Bank accounts & Safe Deposit Boxes
- Investment Accounts and/or individual security certificates
- Pension plan information
- Credit card information
- Will, healthcare proxy, power of attorney
- Birth certificates
- Property ownership and debts
- List of Income and Expenses
- Medical records with current prescriptions and list of doctors
- List of important contacts:
 - Attorney
 - Accountant
 - Investment Advisor
 - Banker
 - Other

Remember to make a duplicate copy of each document for yourself. The more systems you have in place, the more your loved one will maintain independence and safety in their own home, giving you peace of mind as you return to your daily activities.

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