

Information You Need

As we age, it becomes tougher to remember where we have stored pertinent information. Here is a checklist that provides some thoughts on current family matters. Just as you built a checklist for survivor information, try to build a data base for other pertinent information.

Here are some ideas for information to collect:

Individual records for yourself and family members – birth and death certificates, marriage and divorce papers, naturalization papers

Employment history – place, duration and positions

Education – degree or certificates, schools and dates

Membership in associations or clubs – past and current organization and any positions held

Medical records – places and dates for hospitalizations, significant medical procedures, immunizations. Don't forget significant dental or eye procedures. List of medications and any supplements

Military service records – records, awards, discharge papers

Financial information – bank accounts, safe deposit box location and key location, investment securities such as stocks, bonds, retirement funds

Social Security – annuity qualification forms, card location,

Income Tax – Where are the copies of old state and federal forms

Loans – Type and contract location. If closed, keep that document as well.

Credit cards – account numbers and where to call if card is lost

Property Ownership – Real and Personal Property - Location of deeds and titles, type of ownership.

Insurance – Life, Property, Health. Where are the contracts, claim history, proof of payment?

Power of Attorney – Where is it located?