

Document Checklist

It can be confusing going through all of mom or dad's paperwork - here is what you will need before moving into a home.

You will want to have copies of the following documents, and it may be a good idea for another loved one to keep a copy as well:

- Birth certificate
- Social security card
- Driver's license or state ID card
- Passport
- Medicare/Medicaid card
- Secondary insurance cards
- Long term care insurance information
- Supplemental insurance cards
- Organ donor card
- Marriage certificate
- Credit cards
- Mortgage records
- Military records
- Power of attorney, conservator, guardianship, POLST (physician orders for life-sustaining treatment), advance healthcare directive, living will

Make a list of the following, including phone numbers:

- Clergy members
- Attorney
- Family members
- Beneficiaries
- Bank accounts, safe deposit boxes, loans and credit cards
- Insurance agents
- Burial plots
- Receipts and appraisals for valuables