

CRITICAL DOCUMENTS

Key Contacts

Phone and Email

Physician	
Physician	
CPA/Attorney	
Investment Broker	

General Items

Location/Details

Birth Certificate	
Divorce Papers	
Driver's License (copy)	
Marriage Certificate	
Passport	
Safe and Combination	
Safe Deposit Box(es) and Key(s)	
Social Security Card	

Emergency Papers

Location/Details

Beneficiary Forms for IRAs, 401(k)s, etc.	
Burial Instructions	
Cemetery Plot Deed	
Charitable Donation Preferences	
Durable Power of Attorney	
Financial Institution's Power of Attorney	
Funeral Home Information	
Last Will and Testament	
Living Will/Health Care Proxy	
Pre-Paid Cemetery or Funeral documents	

Other Documents

Location/Details

Banking – checking/credit cards/passbook savings	
Life Insurance Policy(ies)	
Long Term Care Insurance Policy	
Medical Bills, Prescription Plan Cards/Records	
Property/Mortgage Documents	
Motor Vehicle title/insurance documents	
Tax Returns (past 3 years)	
Rental/Lease Agreements	

Eileen D. Stier, Esq.
Taking the Worry Out of Caring
Tel: 516-829-9614

*Elder Law * Special Needs * Trusts*
*Estates * Wills * Real Estate * Guardianships*
Email: eileen@stierlawgrp.com