

## Organizing Your Important Papers – Part 2

### Important Papers to Keep at Home

By Elaine Wiant and Carole Larkin

Q. Your last article mentioned a notebook. What should I keep at home in a notebook?

A. We like to keep important records in a notebook or notebooks at home. You may prefer file folders. Be sure that someone – a family member or friend – knows where you keep the notebook or folders. And keep the notebook(s) and/or file folders handy so you can grab them in case you need to evacuate your home (think Katrina!). We suggest you keep the following at home:

**Copies** of the following:

- Will(s)
- General Durable Power of Attorney
- Medical Power of Attorney
- Advanced Directives (Living Will)
- HIPPA release

**NOTE:** Most people need ALL of the documents listed above. Contact your attorney or an elder law attorney to update and get additional documents as needed.

**Copies** of:

- Living Trust and estate planning documents
- Birth Certificates
- Marriage certificate
- Divorce decree
- Adoption papers
- Citizenship records
- Life Insurance Policies
- Social Security cards, or a list of Social security numbers
- List of Credit Card, Brokerage, Mutual Fund, Savings and Checking Accounts  
(with Passwords)
- Account numbers for utilities and other bills
- List of computer passwords (if you have more than you can remember).
- Photocopy of everything you keep in your wallet
- Photos of your family and pets for identification.

**NOTE:** Be sure to update the lists of account numbers, passwords and copies of wallet contents regularly.

**Originals** of:

Funeral Arrangements, cemetery deeds and other instructions regarding your burial

Originals of insurance policies aside from Life Insurance, (i.e. Automobile Insurance, Health Insurance, Long Term Care Insurance, Medigap Insurance, Disability Insurance, Homeowners' Insurance, Renters' Insurance, etc...)

Retirement Plan documents (Summary, Statement of Benefits, Social Security statements)

Passports

Current leases

Previous Tax Returns (seven years) and the records to go with them

Bills of sale, Warranties, Lists of Model and Serial Numbers for major items

Important cancelled checks

Certificates of deposit, list of serial numbers for savings bonds

Loan documents

Brokerage statements

Copy of the inventory (including pictures or video) of your Household goods.

Inventory of what is inside the safety deposit box.

Document inventory – a list of your documents and where they are located. See [www.thirdageservices.com](http://www.thirdageservices.com) for a sample.

Location of safe deposit box and key

Other items to keep in your document notebooks:

School records including a copy of diplomas and certificates

Employment records

Professional certificates (copies if you keep them in frames)

Receipts for purchases with a warranty and the warranty

List of prescription drugs

Medical records

Emergency contacts

Backup of computer files (be sure to back up regularly, especially if you keep financial records on your computer)

Next time we will discuss information you should carry in your wallet or purse and information should you NOT carry.

*Contact ThirdAge Services for more information on these and other issues relating to older adults at 214-741-4397 or 214-649-1392 or [ewiant@thirdageservices.com](mailto:ewiant@thirdageservices.com).*

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