



Navigating Aging

Help Your Family Be Prepared: Important Information to Gather

Information list compiled from “Peace of Mind Planner”

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- **Personal Information** - Legal name, maiden name, phone numbers, social security number, where SS card is located, birthplace, etc.
- **Medical Information** - Medical Conditions, health insurance information, primary or other physician information, Medical Power of Attorney and contact information. (Be sure to state what you want done if you are incapacitated)
- **Key Contact Information**-Executor, attorney, financial advisor, insurance agent, health care providers, clergy
- **Dependents Contact Information** - and instructions for their care, if necessary.
- **Important Documents** - Will, driver’s license, passport, birth certificate, marriage certificate, etc. (Include information as to where these items can be found.)
- **Financial Information**- Power of attorney, bank accounts, credit and debit cards, investments, tax records, safe deposit box information, where the key is kept, money you owe, what is owed to you
- **What Beneficiaries Can Expect**- Life insurance policies, employer benefits, retirement accounts, investment accounts, social security
- **Personal Property**- Residence, real estate, commercial property, vehicles, heirlooms, firearms storage units, safes, hidden valuables

- **Insurance** - Life, home, rental, health, motor vehicle, boat, other (Include account numbers, expiration dates, etc.)
- **Pets** - Names, descriptions, ages, vet information, care plans, care instructions (Any favorite treats, habits, etc.)
- **What to Pay, Close, and Cancel** - Utilities, mobile phone, cable/internet, online and autopay information, charities, subscriptions, organizational and fitness memberships, library cards, etc. (include any account numbers and billing dates, if possible).
- **Email and Social Media** - User names and passwords for emails, social media accounts, websites, etc.
- **Miscellaneous Information** - What else you might want caregivers or relatives to know- i.e. (music you might want to listen to, sounds that annoy you, etc.)
- **Personal Wishes**-Do you want people visiting you, should relatives be contacted, etc.
- **At the Time of Passing** - People to contact, any arrangements that have been made, name of cemetery, plot information, obituary information, clergy, etc.
- **Last words**