

KEEPING RECORDS

The following is a family checklist of important information and documents that need to be regularly updated and available on short notice. (Source: Council on Aging of Middle Tennessee)

- All bank accounts, account numbers, types of accounts and account locations
- Loan/lien information and who holds them
- Other income sources, retirement, 401(k), investments
- Real estate records, deeds and titles
- Insurance company policy numbers, beneficiary as stated on the policies, and the type of insurance (health, life, long-term care, home, auto, etc.)
- Social Security and Medicaid numbers
- Military history, veteran status (including discharge papers)
- Designate one (or even better, two) people for access to all records and computer accounts
- Legal documents, including: will, advance care directive and Powers of Attorney



Make sure your family knows where your records are kept. Always inform them of important changes. All your work to prepare for an emergency will be wasted if no one knows where to find the information you have collected for them.

