

## What Exactly Is an "Important Paper?"

We have all been told that we should keep "important papers in a safe place". But what is considered an "important paper"? Please keep in mind this is a starting place. You may have other information or documents you want to include. For example, if you have a pet, you will want to include the name and address of your veterinarian.

### Personal Records

- Full legal name
- Social Security number
- Legal residence
- Date and place of birth
- Names and addresses of spouse and children
- Location of birth and death certificates and certificates of marriage, divorce decree, citizenship, and adoption
- Employers and dates of employment
- Education and military records (DD-214 or any discharge papers)
- Names and phone numbers of religious contacts
- Memberships in groups and awards received
- Names and phone numbers of close friends, relatives, Elder Law Attorney, and financial advisor
- Name and phone numbers of doctors
- Medications taken regularly
- Location of original legal documents

### Financial Records

- Sources of income and assets (retirement funds, IRAs, 401(k)s, Social Security statement etc.)
- Social Security and Medicare information
- Insurance information (life, health, long-term care, home) with policy numbers and agents' names and phone numbers
- Names of your banks and account numbers (checking, savings, credit union)
- Investment income (stocks, bonds, property) and stockbrokers' names and phone numbers
- Copy of most recent income tax return
- Liabilities (including property tax), what is owed, to whom, when payments are due
- Mortgages and debts – how and when paid
- Location of original deed of trust for home and car title
- Credit and debit card names and numbers
- Location of safe deposit box and key

## Steps for Getting Your Affairs in Order

**Put your important papers and copies of legal documents in one place.** You could set up a file, put everything in a desk or dresser drawer, or just list the information and location of papers in a notebook. If your papers are in a bank safe deposit box, keep copies in a file at home. Check each year to see if there's anything new to add.

**Be sure to tell a trusted family member or friend where you put all your important papers.** You don't need to tell this friend or family member your personal affairs, but someone should know where you keep your papers in case of emergency.

**Give consent in advance for your Elder Law Firm to talk with your family.** There may be questions about your care, a bill, or a health insurance claim. Without your consent, your family may not be able to get needed answers.

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