

Important Documents Worksheet



PA CareKit

Contact Information

Include contact information for emergency contacts, doctors, attorneys, accountants, clergy, insurance agents, and others.

Name and Address	Phone	Relationship

Notes: _____

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Storage Locations

Include the address and description of storage locations.

Location A: _____

Location B: _____

Location C: _____

Inventory

Check the storage location of important documents and items.

Item	A	B	C
Will(s)			
Advance Health Directive			
Power of Attorney – healthcare			
Power of Attorney – finance			
Safe combination			
Safe deposit box key			
Trust agreement			
List of banking accounts			
List of credit cards and numbers			
Funeral arrangements			
List of stored and loaned items			
Birth certificate			
Marriage certificate			
Children's birth certificates			
Digital account info/passwords			

Item	A	B	C
Life insurance policy(s)			
Health and Long-term Care insurance policy(s) or other health care coverage documents			
Car insurance policy			
Homeowner/rental policy			
Employment contracts			
Partnership agreements			
Retirement papers			
Retirement accounts			
Titles and deeds			
Notes (mortgages)			
Auto ownership records			
Military/veteran's papers			
Divorce/separation records			
Other			

Source: www.caregiver.org and www.nia.nih.gov

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