



Get Your Ducks in a Row!

These details belong to: _____

Date of last update: _____

This form is a place for you to list the key documents and information your loved ones will need to access when you are no longer able to communicate.

Why do you need to think about this?

- 1) It puts in one place the information others will need when you can no longer handle your affairs, and
- 2) It helps you describe your wishes and consider your financial and physical health as part of your end-of-life planning.

What should you do with this? Print this document, save it to your computer, put it on flash drives for your family, give it to your partner – whatever it takes to keep it in your mind and make sure it’s current. Our lives change, so remember to review it periodically. Important details change when you marry, divorce, buy a home, downsize, move, reorganize, etc.

Have the conversation! It’s not enough just to fill in the blanks, though that is a first step. We need to talk to our loved ones about this information, and about what our wishes are if we are no longer able to communicate them.

Location of legal documents

Will (and trusts) _____

Advance Directive (Living will) _____

Power of Attorney _____

Medical Power of Attorney _____

Beneficiaries _____

Bequests _____

Notes:

This document covers the basics, but you should add, edit, and delete as you need, based on what is happening in your life. Add more pages if necessary. Confirm you have the items, and jot down on the form where they are located. You may want to scan the documents with this form and save them on a flash drive.

Remember: Let one or two people you trust know where this information can be accessed if or when it is needed. Give this form and copies of other documents to the Personal Representative and Power of Attorney listed in your will, and keep a copy of this form with your other important documents (will, advanced directives, policies and licenses, etc.)

Mortgage(s) _____

Safety deposit box (and location of key) _____
401K or IRA: _____
Brokerage account, stocks, CDs, other savings or retirement funds:

College savings (529 plan) _____
Debt (credit cards, auto loans, school loans, etc.) _____

Account(s) on auto-pay (payee and how paid – credit card, bank account, other)

Passwords (for my computer, online websites, airline mileage plan, utility companies, autopayments, access code for phone, other?) List here, attach a list, or indicate where they can be found

Medical and Health:

Primary Physician _____
Specialists _____
My medical records are located here _____

Insurance policies (company, agent, and contact information)

Life insurance _____
Health insurance _____
Dental _____
Visual _____
Audio _____
Long Term Care _____
Home/Rental Insurance _____
Auto insurance _____
Umbrella insurance _____
Other (pet insurance, other?) _____

Family members, friends, and neighbors (can answer questions or who should be notified in the event of my disability or death) Include phone and/or email

Obituary information [Parent's and siblings' names, place of birth, education (high school, college(s), graduation date), employment history (attach resume?) – Obituary location (newspaper)]

Organizations, schools, or others who should be notified in the event of my death

Burial preference, prior arrangements

Plans for my pets

Printed name _____
Signature _____ Date _____

Legal Documents

**See state requirements for these documents
and where they should be stored/deposited**

- **Power of Attorney** (durable power of attorney) -- the authorization to represent or act on another's behalf in private affairs, business, or some other legal matter
- **Medical Power of Attorney** (health care proxy) – the authorization to make medical decisions for a patient who is unable to make decisions regarding his/her own health
- **Advance Directive (Living Will)** – a legal document in which a person specifies what actions should be taken for their health care if they are no longer able to make decisions for themselves because of illness or incapacity
- **Will (Last will and testament)** - a legal document that expresses a person's wishes as to how property is to be distributed at death and names one or more persons, the personal representative (executor), to manage the estate until final distribution

This form was prepared by Aging at Home Fairbanks, using information from many different sources. We hope you find it useful. Handouts will be posted on our website - aahfairbanks.org
Aging at Home at Home Fairbanks, aahfairbanks@gmail.com, 907-799-4026

