



Get Your Ducks in a Row!

These details belong to: _____

Date of last update: _____

Get Your Ducks in a Row is a summary of key documents and tasks you should think about as you get older.

Why do you need to think about this?

- 1) It helps you consider your assets and wishes, so you can assess your financial health as well as plan for possible physical health issues, and
- 2) It puts in one place the information others will need when you can no longer handle your affairs.

What should you do with this? Print this document out, save it to your computer, give it to your partner – whatever it takes to keep it in your mind and make sure it's current. Our lives change, so it should be reviewed and updated annually. Remember, 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 the 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 original legal documents and copies

Will (and trusts) _____

Advance Directive (Living will) _____

Durable/Financial 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 and this form and save them on a flash drive. Do not keep this inventory in a safe deposit box as your survivors will need it immediately.

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 Powers 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.)

Banking and Business (bank names, account numbers, and contact info)

Checking account(s): _____

Savings account(s): _____

Other bank account(s) _____

Income stream, how and when payments are received; Social Security, pension, annuities, RMD, other: _____

Safety deposit box (located in a bank or at home?; location of key):

401K, IRA: _____

Brokerage account, stocks, CDs, other savings or retirement funds: _____

Location of past tax returns/ supporting data: _____

College savings (529 plan) _____

Mortgage(s): _____

Debt (credit cards, auto loans, school loans, etc.): _____

Debts or notes to others, money owed via undocumented loans: _____

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

Accounts paid online (see passwords below)

Passwords (for your computer, email host, online websites and social networking, airline mileage plan, utility companies, autopayments, access code for phone, voice mail, security codes, other?) List here or indicate where passwords can be found, and how bills are received. Consider storing this list in a password-protected document or location, or with a trusted person in a secure location.

Medical and Health, names and contact info:

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 (Date and place of death; cause if wanted; age at death; city of residence; date and place of birth; parents' and siblings' names; education and employment; religious, social, community and volunteer affiliations; hobbies and interests; honors, prizes and accomplishments; children or close relatives—survived by. Where do you want the obituary sent—newspapers, alumni newsletters etc: and if you have a draft obituary, where is it located?)

Burial preference, prior arrangements: _____

Pets (name, type and breed, what feed and when, any medications, contact info for vet, microchip info)

Signature: _____

Printed Name: _____ Date: _____

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



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