

WSA CHECKLIST: IMPORTANT PEOPLE AND PAPERS

If your spouse had a medical emergency, would you know where to find all your important papers?

In many households, there tends to be one spouse who is the "paperwork person"- the one who pays the bills, files the statements, and handles the important documents. This trend is especially prevalent in the homes of spousal caregivers. Unfortunately, if there is an emergency, the other spouse or family member may not know where to find vital documents. Some records may be stored at home; others could be kept in a different place such as a bank or lawyer's office. This form will help you track your important documents and papers.

Take the time to fill this form out- you'll be glad you have the information if trouble strikes!

Personal information:

Name: _____

Address: _____

Phone number _____ E-mail: _____

Date of Birth: _____ Social Security Number: _____

Date this paperwork was prepared: _____

Copies given to: _____

The following page shows where my critical personal, financial and business records are located:

A. Home Safe (combination) _____

B. Home Files (location at home) _____

C. Safe Deposit Box (Bank name _____
(Address) _____

D. Lawyer's Office (Lawyer's name) _____
(Contact information) _____

E. Other: _____

PERSONAL RECORDS	A	B	C	D	E
Adoption papers					
Baptism/Confirmation or other religious records					
Birth certificate(s)					
Child Custody agreements					
Citizenship papers					
Death Certificate(s)					
Diplomas					
Divorce/Separation decrees					
Funeral arrangements					
Health records					
Employment contracts					
Employment history					
Living Will					
Marriage certificate					
Military records/discharge papers					
Partnership contracts					
Passport(s)					
Power of Attorney (for healthcare)					
Retirement paperwork					
Social Security card					
Wills					
Other:					
FINANCIAL RECORDS					
Bank statements					
Bonds					
Checking Account information					
Credit/Debit/ATM cards list					
Deferred compensation					
IRA information					
Loan terms					
Mutual Fund paperwork					
Power of attorney (for financial matters)					
Savings account lists					
Stock Certificates					
Other:					
INSURANCES					
Automobile					
Health Care					
Homeowner's policy					
Individual					
Life					
Long Term Health Care					
Professional					
Other:					
LOANS/ MORTGAGES/TITLES					
Automobile payment/lease agreements					
Automobile title					
Mortgage					
Property deed(s)					
Student loan agreements					
Other:					

IN CASE OF EMERGENCY, NOTIFY:

Name: _____ Relationship: _____

Address: _____

Phone number: _____ E-mail: _____

Accountant:

Name: _____ Company: _____

Address: _____

Phone number: _____ E-mail: _____

Clergy:

Name and House of Worship: _____

Address: _____

Phone number: _____ E-mail: _____

Employer:

Name: _____ Company: _____

Address: _____

Phone number: _____ E-mail: _____

Insurance Agent:

Name: _____ Company: _____

Address: _____

Phone number: _____ E-mail: _____

Lawyer:

Name: _____ Company: _____

Address: _____

Phone number: _____ E-mail: _____

Primary Physician:

Name: _____

Address: _____

Phone number: _____ E-mail: _____

Stockbroker/Investment Advisor:

Name: _____ Company: _____

Address: _____

Phone number: _____ E-mail: _____