



ALL GENERATIONS LAW™
Planning and Protection
for
You and Your Family

PREPARING IN ADVANCE: Instant Locator of Important Papers When You Need Them

No matter whether your parent or other loved one is in the best of health or especially if he or she has a potentially debilitating illness, finding out where all of their important papers are before a crisis occurs will later be a great help. The location of any information contained in these papers will be invaluable to you in providing the best possible care and assistance for the parent or loved one if and when it is needed.

Please use this form as a tool in working with your parent or loved one to locate these important papers now. In the process you will be provided the opportunity to discuss their needs and wishes and also determine whether these documents fulfill the parent or loved one's expectations or if they might need to be updated. It is also a wonderful opportunity to make sure you understand the individual's personal wishes and concerns and you will then be better able to make sure that they have everything they need.

Date this form completed: _____

Name: _____

Date of Birth: _____ Social Security #: _____

Contact(s) for Emergencies:

Phone #'s: _____

Where are these Identification Documents Located?

Social Security Card: _____

Passport/ Citizenship Papers: _____

Military Records: _____

Dates of Service: _____

Branch of Service: _____

Military ID #: _____

Where are these Financial Records Located?

(remember to collect information about checking, savings, money market, CD's and retirement accounts)

Bank/ Credit Union Statements:

Name of Institution: _____

Type of Account: _____

Account Number: _____

Location of Statements: _____

Log On/ Password: _____

Name of Institution: _____

Type of Account: _____

Account Number: _____

Location of Statements: _____

Log On/ Password: _____

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Log On/ Password: _____

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Account Number: _____

Location of Statements: _____

Log On/ Password: _____

Name of Institution: _____

Type of Account: _____

Account Number: _____

Location of Statements: _____

Log On/ Password: _____

Investment Brokers/ Brokerage Accounts:

Name of Broker/Firm: _____ Phone: _____

Account Number: _____

Location of Records: _____

Log On/ Password: _____

Name of Broker/Firm: _____ Phone: _____

Account Number: _____

Location of Records: _____

Log On/ Password: _____

Bonds:

Type and Location: _____

Type and Location: _____

Stock Certificates:

Type (name of company) and Location: _____

Type (name of company) and Location: _____

Do You Have A Safe Deposit Box?

Where is it located? _____

Where are the keys located? _____

Where are These Papers Located?

Deeds to Property: _____

Mortgage Documents: _____

Documents for Loans you Owe: *(include name of creditor)*

Documents for Loans Owed to You: (include name of creditor)

Pension Statements _____

Automobile Title & Registration: _____

Your Will _____

Your Trust(s) _____

Your Income Tax Records: _____

Where are your Insurance Policies & Other Insurance Papers Located?

Medical Insurance: _____

Disability Insurance: _____

Long Term Care Insurance: _____

Homeowner's Insurance: _____

Automobile Insurance: _____

Other Insurance: _____

Where are your Advanced Directives Documents Located?

Durable Power of Attorney: _____

Living Will: _____

Health Care Surrogate/Health Care P.O.A.: _____

Organ Donor Card: _____

Do Not Resuscitate Orders: _____

Who is your Primary Care Physician? _____

Do you Already Have Burial or Other Arrangements?

Name of Funeral Home or Facility: _____

Location of Contracts: _____

Name & Phone Number of Clergy: _____

Cemetery Location & Name: _____

Location of Deed for Cemetery Plot or Other Final Resting Place: _____
