



ABOUT YOUR CAREGIVER FILE

To stay organized when conducting business for your loved one, create a file of regularly needed important information. Having this information together and handy can reduce the stress of hunting it down in a crisis. Be sure to replace outdated or updated information as soon as possible. A tabbed folder or binder system makes your file easily accessible and organized.

YOUR CAREGIVER FILE SHOULD INCLUDE

1. Emergency contacts
2. Photo identification, including state-issued identification and passports
3. Military identification (if applicable)
4. Social Security Card & Alien Registration Card (if applicable)
5. Insurance cards (Medicare, Health Insurance, Medicare Prescription Drug Program, Medicare Supplemental Insurance, Medicaid, Car Insurance)
6. Living Will
7. Documents giving decision-making authority on behalf of your loved one (Durable Power of Attorney, Health Care Surrogate Designation, Letters of Guardianship, Trust, etc.)
8. Alternative decision-makers and contact information
9. List of financial accounts, their corresponding institutions, and contact information for each
10. List of credit cards or debit cards and contact information
11. List of income sources and contact information, including annuities and stocks/bonds (if applicable)
12. List of allergies and current medications, including dosages
13. Health care provider information (primary care physician, specialists, pharmacy, home health, hospital, hospice, etc.)
14. Professional services provider information (attorneys, accountants, advisors, etc.)
15. Pre-arranged funeral and burial or cremation information
16. Original Last Will & Testament
17. Life insurance policies