

## 50 Memory Joggers for Documents and Forms to Organize and Have Readily Accessible

- 1 A "READ ME FIRST" General letter of instruction about how to handle things, key people
- 2 A letter describing the location of all documents, assets. property, items on loan to family / friends
- 3 Authorization to Release Protected Healthcare Information form. HIPPA Release.
- 4 Bank Accounts Statements
- 5 Bill payment dates, method, address, contact numbers
- 6 Biography – Profile of preferences
- 7 Child-support payment, receipts, court decrees
- 8 Combinations to locks, safes, briefcases
- 9 Contacts – emergency, professional, personal
- 10 Contracts – equipment, services, time share, hearing aids, storage unit
- 11 Credit Cards and Credit Card statements
- 12 Credit Report, Credit Card List
- 13 Deeds to Housing, land and cemetery plots
- 14 Divorce Decree / Papers
- 15 Do-not-resuscitate order - DNR
- 16 Durable power of attorney – health-care
- 17 Durable power of attorney - financial
- 18 Escrow mortgage accounts, House Settlement Documents
- 19 Funeral Arrangements, Cremation contract
- 20 Health Care Surrogate Designee - ?POA Health Section
- 21 Identification – Picture ID, Passport, Military ID,
- 22 Individual retirement accounts – IRA Traditional / IRA Roth / 401K
- 23 Insurance – Medical, Drug, Dental, Optical, Auto, House, Life, Boat, Disability, Long Term Care
- 24 Inventory – Tangible Assets - Jewelry, Equipment, Collections, Coins,
- 25 Law suit settlements and agreements
- 26 Legal "qualified domestic-relations order" judicial order for property division
- 27 List of any debts you owe to avoid surprising your family.
- 28 Living Will detailing your wishes.
- 29 Loans you have made to others. Private loans
- 30 Loans you owe – car, boat, trailer, travel,
- 31 Login User Name & Password -Computers, Phones, Online Acct.
- 32 Marriage license
- 33 Medicaid Card and Documents
- 34 Medical Assessment AHCA 1823 – needed for facility acceptance,
- 35 Medical History of self and family, TB test, Inoculations
- 36 Medicare Card
- 37 Membership Cards for Clubs, Fraternity, Sorority, Train Show
- 38 Online Pay Pal account details – linked accounts
- 39 Partnership and corporate operating agreements
- 40 Pensions Documents
- 41 Post Office Box agreement
- 42 Proof of Ownership – Titles, Receipts,
- 43 Safe-deposit boxes agreements
- 44 Social Security Card, Social Security 1099, awards and benefit grants
- 45 Stock certificates, savings bonds and brokerage accounts, statements
- 46 Tax - Returns for Most recent three years plus current year receipts
- 47 Titles to Vehicle, Trailer, Boat, Motorcycles, Equipment
- 48 Trust – Revocable living trust, Irrevocable Trust, Trustee info for someone else's trust
- 49 Veteran Service Records and Documents, Honors, Awards, Discharge -DD214,med records
- 50 Warranties – Extended Auto, Appliances, Equipment, Roof, Water heater, Service agreements
- 51 Will – Last Will and Testament, Bequests, Letters or Notes to Family and Friends



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