

Documents checklist

Where each paper is kept and who has a copy. Never write passwords or full account numbers here.

Document	Have it?	Where it's kept	Who has a copy
Healthcare proxy / medical power of attorney Who can make medical decisions if they can't	☐ Yes ☐ No		
Financial power of attorney Banks often want the original or a certified copy	☐ Yes ☐ No		
Living will / advance directive Their wishes for end-of-life care	☐ Yes ☐ No		
DNR or POLST / MOLST form Paramedics often look for this on the fridge	☐ Yes ☐ No		
Will Where the signed original is kept	☐ Yes ☐ No		
Insurance cards (front and back) Keep photos, not just the cards	☐ Yes ☐ No		
Medicare card	☐ Yes ☐ No		
Supplement, Medigap or long-term care insurance Policy number and phone line	☐ Yes ☐ No		
Photo ID and passport	☐ Yes ☐ No		
Social Security and pension details Write where it's kept, not the number	☐ Yes ☐ No		
Bank accounts list Bank names only, never full account numbers here	☐ Yes ☐ No		
Bills on autopay Utilities, phone, insurance premiums	☐ Yes ☐ No		
Property deed or lease	☐ Yes ☐ No		
Vehicle title and insurance	☐ Yes ☐ No		
Tax returns (last 3 years)	☐ Yes ☐ No		
Online accounts and passwords Write where they're stored, never the passwords	☐ Yes ☐ No		
Hospital discharge papers Keep the latest ones, they list medicine changes	☐ Yes ☐ No		
Recent test results and scans	☐ Yes ☐ No		
Funeral or burial wishes / prepaid plan	☐ Yes ☐ No		
Spare house key and alarm code Who has them	☐ Yes ☐ No		