

What Information Should a Caregiver Keep Track of?

excerpts from "So Far Away" National Institute on Aging

The answer to this question is different for every family. This list is a starting point which can be updated as needed. Your parents may be reluctant to share personal information with you. Explain that you are not trying to invade their privacy or take over their personal lives- you are only trying to assemble what will be needed in the event of an emergency. Assure them that you will respect their privacy and keep your promise. If your parents are still uncomfortable, ask if they would be willing to work with an attorney, or perhaps another trusted family member or friend.

- Full legal name and residence
- Birth date and place, birth certificate
- Social Security and Medicare numbers
- Employer(s) and dates of employment
- Education and military records
- Sources of income and assets, investment income (stocks, bonds, property)
- Insurance policies, bank accounts, deeds, investments
- Most recent income tax return
- Money owed, to whom, and when payments are due
- Credit card account names and numbers
- Safe deposit box key and information
- Will, beneficiary information
- Durable power of attorney
- Living will and/or durable power of attorney for health care
- Where cash or other valuables might be kept in the home