



The Documents Locator Action Checklist Chapter 15 of *The Complete Eldercare Planner*

THE DOCUMENTS LOCATOR	To Do By	Completed
<i>Complete the Documents Locator</i> _____		<input type="checkbox"/>
<i>Make copies of original documents</i> _____		<input type="checkbox"/>
<i>Store original documents in safe place</i> _____		<input type="checkbox"/>
<i>Maintain 24-hour access to original documents</i> _____		<input type="checkbox"/>
<i>Back up Documents Locator information on a flash drive</i> _____		<input type="checkbox"/>
<i>Keep in safety-deposit box</i>		
stock certificates _____		<input type="checkbox"/>
securities and bonds _____		<input type="checkbox"/>
certificates of deposit _____		<input type="checkbox"/>
titles to property and vehicles _____		<input type="checkbox"/>
deeds _____		<input type="checkbox"/>
bills of sale—major purchases and valuables _____		<input type="checkbox"/>
appraisals of property and valuables _____		<input type="checkbox"/>

- retirement bank account records _____
- company pension records _____
- contracts and legal agreements _____
- naturalization papers _____

Duplicate and distribute copies of these documents

to key family members and family attorney

- proof of insurance _____
- letters of instruction _____
- power of attorney for property _____
- power of attorney for health care _____
- living will _____
- the Documents Locator _____

Keep in fireproof box at home

- birth certificates _____
- death certificates _____
- marriage licenses _____
- divorce decrees _____
- financial records _____
- passports _____
- insurance policies _____
- wills _____

- letters of instruction _____
- power of attorney for property _____
- power of attorney for health care _____
- military discharge papers _____
- income tax returns for past six years _____
- property tax receipts _____
- warranties _____