

# Important Personal Information

Losing track of a loved one's key personal information can be a major source of stress for caregivers. By keeping all the most important medical, legal, and financial details in one document, you can rest assured that you and your loved one won't have to scramble to find it or remember it during a crisis. Once you've filled out the form, keep it in a handy but secure place and update it regularly.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_ SSN: \_\_\_\_\_

Health and Medical Insurance	
Medicare Number	
Medicare Supplement	
Medicare Advantage Plan (if applicable)	
Medi-Cal Number	
Disability Information	
Long Term Care Insurance	

Doctors			
	Doctor #1	Doctor #2	Doctor #3
Name			
Specialty			
Address			
Phone #			

Dentists		
Name	Address	Phone Number

Other Health Care or In-Home Care Providers		
Name	Address	Phone Number

Current Medications - Prescription and Over-the-Counter		
Name of Drug	Dosage / How Often Taken	Prescribed By

Legal and Financial Information - Location of Documents	
Will	
Trust	
Power of Attorney	
Advance Health Care Directive	
Birth Certificate	
Divorce Decree	
Property Deeds	
Safe Deposit Box	
Location of Keys	
Other Documents	

Sources of Income	
Income	Monthly Amount
Social Security	
Retirement/Pension	

Bank Accounts		
Type	Name of Bank	Account Number
Checking		
Savings		

<b>Investments</b>			
Type	Institution or Broker	Phone Number	Location of Acct. Statements
Stocks			
Bonds			
Annuities			
Cert of Deposits (CDs)			
Mutual funds			
IRAs			
Money Market			
Other			

<b>Name of Accountant/Broker/Financial Planner</b>		
Name	Address	Phone Number

<b>Insurance</b>		
Type	Company or Agent	Location of Policy
Life		
Homeowners/Rental		
Liability		
Automobile		

<b>Funeral/Burial Instructions</b>
Clergy

<b>Close Friends/Neighbors</b>		
Name	Address	Phone Number