

SENIOR NUGGET ~ ~ ~ DECEMBER 2012

DOCUMENTS YOU NEED ON FILE - KEEP ORIGINALS IN FIRE-PROOF SAFE

- **Marriage license and Divorce papers**
- **Military Discharge papers (Veterans/spouse can be buried free in Veterans cemetery)**
- **Death Certificates (originals from spouse, parents, etc.)**
- **Passports**
- **Last Will and Testament**
- **Letter of Instruction**
- **Trust Document**

HEALTH CARE

- **Personal and family medical history**
- **Durable Health Care Power of Attorney**
- **Authorization to Release Health Care Information**
- **Living Will (Advance Directive)**
- **“Do Not Resuscitate” Order (known as DNR)**

PROOF OF OWNERSHIP

- **House, land, and cemetery deeds**
- **Escrow mortgage accounts**
- **Proof of loans made and debts owed**
- **Vehicle titles**
- **Stock certificates, savings bonds, and brokerage accounts**
- **Partnership and corporation operating agreements**
- **Tax returns (for last 7 years)**

LIFE INSURANCE AND RETIREMENT (Review Beneficiaries yearly)

- **Life Insurance Policies and their location**
- **Individual retirement accounts and their location**
- **401(k) accounts and their location**
- **Pension documents and their location**
- **Annuity contracts and their location**

BANK ACCOUNTS

- **List of bank accounts (retain end of year statements for 5 years)**
- **List of all user names and pin numbers and/or passwords (includes computer)**
- **List of safe-deposit boxes and key location**

Best wishes to all that have a December birthday
Check your Birth Verse: www.birthverse.com

Atholton’s Senior Ministry Director Vivian Stevens--your comments/suggestions are welcomed