

HIGHGATE SENIOR LIVING



Legal & Financial Document Locator

Do you know where your dad’s birth certificate is or where your mom keeps her long-term care insurance policy information? Planning ahead in case of a medical crisis can make all the difference in an emergency situation. Knowing where official records are located as well as having copies of important legal and financial documents can make your job as a caregiver a lot easier. This Legal & Financial Document Locator is intended to be a helpful tool for use at home to organize your loved one’s legal and financial records. Be sure to keep it in a secure location.

Getting Started

Which documents are most important? The answer is different for everyone. The items listed below on the Legal & Financial Document Locator can serve as a guide to help you decide what is important to keep track of.

There are some [important legal documents everyone should have](#)¹ in place. Many of these documents are referred to by a variety of names, and many sound alike. Additionally, state laws vary, so find out about the rules, requirements, and forms used in your state.

Name	Also Known As	Purpose
Will	Last will and testament	Allows you to name the person you want your money and property to go to after you die
Living Will	Advance health care directive, medical directive	Allows you to state what kind of health care you do or don’t want if you become too sick to make your wishes known

¹ <https://www.highgateseniorliving.com/videos/legal-considerationswhat-you-need-to-know/>

Name	Also Known As	Purpose
Durable medical power of attorney ²	Durable power of attorney for health care, health care power of attorney, health care proxy	Allows you to name the person you want to make medical decisions for you if you can't make them yourself
Durable financial power of attorney ³	Power of attorney for finances	Allows you to name someone to act on your behalf for any financial task, even if you become unable to make your own decisions

If your parent hasn't named a durable medical or financial power of attorney, [talk to them about why it's crucial](#)⁴ they have those legal documents in place. If your loved one is struggling with memory loss, it's especially important to take steps early to [protect their financial affairs and medical treatment wishes](#)⁵ before they are unable to make those decisions on their own.

Using the Document Locator

The Legal & Financial Document Locator can be a handy tool to help you organize important documents, property, and contacts. Use it to help organize your loved one's personal information.

There are numerous blank spaces provided so you can personalize your list. For example, if your loved one has a pet, you may want to include the name and address of the veterinarian.

² <https://blog.highgateseniorliving.com/two-must-have-powers-of-attorney-for-seniors>

³ <https://blog.highgateseniorliving.com/two-must-have-powers-of-attorney-for-seniors>

⁴ <https://blog.highgateseniorliving.com/should-you-talk-to-your-parents-about-considering-a-power-of-attorney>

⁵ <https://blog.highgateseniorliving.com/four-legal-documents-to-prepare-for-your-loved-one-with-long-term-memory-loss>

Once completed, provide copies to a few trusted family members as well as your loved one's lawyer and their power of attorney to have in case of an emergency. Make certain it is always kept in a safe place to protect personal information.

Making Sure Your Affairs Are in Order

- ❑ Ensure your loved one has a financial POA and medical POA, a living will, and a standard will or living trust.
- ❑ Put their important papers and copies of legal documents in one place.
- ❑ Tell a trusted family member where you put the important papers.
- ❑ Fill out the Legal & Financial Document Locator.
- ❑ Provide copies to a few trusted family members as well as your loved one's lawyer and their POAs.
- ❑ Check each year to see if there's anything new to add.

Important Documents Location

Name the locations where you keep your documents, as well as any other important information.

Personal Papers	Location	Other Information
Will		
Spouse's will		
Trust agreements		
Financial power of attorney		
Medical power of attorney		
Living will/advance directive		
Birth certificate		
Social Security card		
Marriage certificate		
Divorce/separation papers		

Personal Papers	Location	Other Information
Citizens papers		
Adoption papers		
Military papers		
Family death certificates		
Education record		
Employment record		
Driver's license		

Property Papers	Location	Other Information
Vehicle titles		
Property deeds		
Safe-deposit box/keys		
Appraisals		
Safe combinations		

Financial Papers	Location	Other Information
Bank accounts		
Credit card accounts		
Home and property loans		
Tax returns		
Gift or estate tax returns		

Sources of Income	Monthly Amount	Other Information
Social Security		
Retirement/pension		

Notes:

Bank Account	Name of Bank	Account Number
Checking		
Savings		
Credit Union		

Notes:

Investments	Institution or Broker	Location of Statements
Stocks		
Bonds		
Annuities		
Certificate of deposits (CDs)		
Mutual funds		
IRAs		
Money market		

Insurance Policies	Location	Other Information
Home/renter		
Health		
Long-term care		
Vehicle		
Life		
Medicare/Medicaid		

Personal Advisors & Contacts

Insurance Agent _____ Company _____

Address _____ Phone _____

Insurance Agent _____ Company _____

Address _____ Phone _____

Tax Preparer _____ Firm _____

Address _____ Phone _____

Attorney _____ Firm _____

Address _____ Phone _____

Physician _____ Office _____

Address _____ Phone _____

Financial Advisor _____ Company _____

Address _____ Phone _____

Clergy _____ Organization _____

Address _____ Phone _____

Close Friend _____

Address _____ Phone _____

Neighbor _____

Address _____ Phone _____

Other _____

Address _____ Phone _____

Other _____

Address _____ Phone _____

Other _____

Address _____ Phone _____

Other _____

Address _____ Phone _____

Other _____

Address _____ Phone _____

Losing track of a loved one's key personal information can be stressful. By keeping all the most important legal and financial details in one place, 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 an easy to find but secure place and remember to update it regularly.



This guide is brought to you by Highgate Senior Living, an industry-leading assisted living and memory care provider offering a holistic approach to care. Pioneering change in the senior living industry, Highgate is committed to creating a unique and desirable living option where each resident can live a life of purpose.

Visit our website at www.highgateseniorliving.com to learn more.

Highgate Senior Living. Each Day to the Fullest.

® Highgate Senior Living. All Rights Reserved.