

Important Document Checklist

Compiling the personal documents of the person with Alzheimer's disease is a necessary early step in putting legal and financial matters in order. Important documents may include, but are not limited to the following:

IDENTITY AND STATUS

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|--|---|
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Medicaid Card |
| <input type="checkbox"/> Death Certificate of Spouse | <input type="checkbox"/> Medicare Card |
| <input type="checkbox"/> Driver's License | <input type="checkbox"/> Military Records |
| <input type="checkbox"/> Final Divorce Decree/Separation Agreement | <input type="checkbox"/> Naturalization Records |
| <input type="checkbox"/> Immigration Documentation | <input type="checkbox"/> Passport |
| <input type="checkbox"/> Marriage License | <input type="checkbox"/> Social Security Card |

INCOME

- | | |
|---|--|
| <input type="checkbox"/> Interest and Dividends | <input type="checkbox"/> Salary |
| <input type="checkbox"/> Pension | <input type="checkbox"/> Social Security Benefits* |
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Veterans Benefits |

RESOURCES

- | | |
|---|---|
| <input type="checkbox"/> Bank and Credit Union Accounts | <input type="checkbox"/> Prepaid Funeral Plans |
| <input type="checkbox"/> Burial Plot Deed | <input type="checkbox"/> Records of Transfers of Assets |
| <input type="checkbox"/> Certificates of Deposit | <input type="checkbox"/> Savings Bonds |
| <input type="checkbox"/> Deeds for Property | <input type="checkbox"/> Stock Certificates |
| <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Trusts |
| <input type="checkbox"/> Life Insurance | |

LIABILITIES

- | | |
|---|---|
| <input type="checkbox"/> Credit Card Balances | <input type="checkbox"/> Property Taxes |
| <input type="checkbox"/> Home Mortgages | <input type="checkbox"/> Unpaid Medical Bills |
| <input type="checkbox"/> Income Taxes | <input type="checkbox"/> Utility Bills |
| <input type="checkbox"/> Loans | |

OTHER

- | | |
|--|---|
| <input type="checkbox"/> Health Care Proxy | <input type="checkbox"/> Powers of Attorney |
| <input type="checkbox"/> Living Will | <input type="checkbox"/> Will |

*For Social Security award letter, call 1 800 772-1213