



5840 East Evans Ave.
Denver, CO 80222
PH: 303-300-6900

ELDER CARE PLANNING CHECKLIST

Date:

Name:

Social Security Number:

Health and Medical Care

Medicare Number	
Medicaid Number	

Doctors

Name	Specialty	Address	Phone Number

Other health care or in-home care providers

Name	Address	Phone Number

Dentists:

Name	Address	Phone Number

Current Medications

Name of Drug	Dosage	How often Taken

Legal and Financial Information

Location of important papers and documents:

Will	
Living Will	
Power of Attorney	
Durable Medical Power of Attorney	
Health Care Proxy	
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		

Investments

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

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Name of Accountant/ Broker /Financial Planner

Name	Address	Phone Number

Insurance

Type	Company or Agent	Location of Policy
Life		
Health		
Medigap		
Disability		
Long Term Care		
Dental		
Homeowners/rental		
Liability		
Automobile		

Funeral/Burial Instructions:

Clergy

Close Friends/Neighbors

Name	Address	Phone Number