

Important Documents: Planning for Care

Important Documents

Below is a list of important documents you should have on hand if you are considering making plans to take care of your parents. Be sure to place them in an accessible, fire-safe, secure location.

- Burial plot deeds
- Birth certificate/adoption records
- Birth certificate of spouse
- Marriage certificates
- Divorce decrees
- Death certificates
- Military discharge
- Immigration and Naturalization Service Card (green card)
- Estate dispersion documents (attorney should know where all copies are located)
- Advance directives (primary care physician, hospital, and individual should have copies)
- Property tax receipts
- List of routine household bills
- Copies of previous three years' tax returns
- Personal loan records
- Retirement and pension policies, including the names of beneficiaries
- Receivables
- Insurance policies
- Bank accounts, pass books
- Certificates of deposit
- Investment certificates
- Business venture interests
- Account or provision for funeral and health care



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