

# LIFE CHANGES – Helping Others to Help You Plan



Often there comes a time when we need help from other people to plan for major changes in our life. Some changes that many experience include; changes in the health of a spouse, the need for additional health care services requiring placement in a long term care facility, and death. Planning ahead for such times can help to reduce stress and keep everyone focused in the same direction. Having the necessary documents organized can help to make the process smoother.

## The following is a list of key items to keep at hand.

1. Drivers license or other picture identification
2. Birth Certificates
3. Social security card and a check stub verifying amounts of funds received
4. Medicare health care insurance card
5. Health Insurance cards
6. List of current doctors
7. List of current medications
8. Health History list including illnesses, surgery and childbirth
9. Living Will
10. Healthcare Power of Attorney
11. Life Insurance
12. Retirement income from all sources
13. Last three years of tax returns
14. Last three years of savings, checking and retirement account balance statements
15. Deed to properties
  - a. Property insurance
  - b. Property taxes
16. Verification of expenses
  - a. Water bill
  - b. Electric bill
  - c. Sewer bill
17. Car titles
18. Marriage certificate
19. Military discharge papers
20. Funeral expenses account
  - a. Burial deed
  - b. Preplanning funeral documentation

Key contact person who will help you:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Location of important documents \_\_\_\_\_