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

____ Birth Certificate  ____ Medicaid Card
____ Death Certificate of Spouse  ____ Medicare Card
____ Driver’s License  ____ Military Records
____ Final Divorce Decree/Separation Agreement  ____ Naturalization Records
____ Immigration Documentation  ____ Passport
____ Marriage License  ____ Social Security Card

INCOME

____ Interest and Dividends  ____ Salary
____ Pension  ____ Social Security Benefits*
____ Rental Income  ____ Veterans Benefits

RESOURCES

____ Bank and Credit Union Accounts  ____ Prepaid Funeral Plans
____ Burial Plot Deed  ____ Records of Transfers of Assets
____ Certificates of Deposit  ____ Savings Bonds
____ Deeds for Property  ____ Stock Certificates
____ Health Insurance  ____ Trusts
____ Life Insurance

LIABILITIES

____ Credit Card Balances  ____ Property Taxes
____ Home Mortgages  ____ Unpaid Medical Bills
____ Income Taxes  ____ Utility Bills
____ Loans

OTHER

____ Health Care Proxy  ____ Powers of Attorney
____ Living Will  ____ Will

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