

Caregiver Checklist

The following is a checklist of personal and legal information that you will probably need knowledge of and access to when caring for an individual.

This list can help the caregiver get organized.

Personal Information

- Social Security number _____
- Medicare number; Medicare supplement _____
- Medicaid number _____
- Military ID number _____
- Doctor _____
- List of all medications being taken _____
- List of allergies _____
- Location of house and car keys _____
- Driver's license number _____
- Friends/neighbors _____
- Clergy _____
- Financial advisor _____
- Attorney _____

Bank Information

- Safety deposit box and key _____
- Checking account number _____
- Savings account number _____

Legal Information

- Will _____
- Health Care Directive _____
- Durable power of attorney for property and finance _____
- Deed to house and other property _____
- Life insurance _____
- Health insurance or HMO _____
- Mortgage papers _____
- Homeowners insurance _____
- Tax records _____
- Apartment lease _____
- Car title _____
- Auto insurance _____
- Boat title _____
- Birth certificate _____
- Marriage certificate _____
- Divorce records _____

Other Information

- Burial plan information _____
- Medical records _____
- Organ donation forms _____
- Credit card account numbers _____
- IRA/pension/401(k) records _____
- Stocks/bonds/mutual funds/CDs _____
- Jewelry/appraisals _____