

# Practical Matters: Getting Things in Order

Are you concerned about having things in order? You may be wondering where to start. The following list can be used as a worksheet to help locate important items and keep track of them. It may help to keep these documents in one place.

Things to Find	Check When Found	Location of the Information
Planning and Advance Directives:		
Living will (Documents indicating wishes regarding end-of-life care)		
Health care surrogate (designated person to make health care decisions when you can no longer make your own)		
Power of attorney (Legal document indicating who is able to make financial decisions on behalf of another person)		
Memorial, funeral, or other arrangements (arrangements for final resting place and service)		
Identification:		
Birth certificate (Provides accurate record of date of birth, maiden name, parents information, etc. Helpful to write obituary.)		
Social Security number (needed for death benefits)		
Passport, immigration and naturalization certificate		
Marriage license (divorce certificate if applicable)		



Things to Find	Check When Found	Location of the Information
Guardianship papers (Legal document indicating who has been given the right to make decisions for a person who cannot make decisions for him or herself)		
Insurance policies: health, accident, disability, life		
VA claim number or honorable discharge certificate (Important for getting death benefits)		
<b>Affiliations</b>		
Social or religious (Clubs, Lodges, church, Hall, Mosque, Synagogue etc)		
Spouse(s), children, family members, clergy, friends employer or business colleagues (list their names, phone number and address)		
Education and military records		
<b>Assets/Debts</b>		
Banking: checking accounts, money market accounts, savings accounts, IRAs, CDs (certificate of deposit), others?		
Annuities, mutual fund shares, stocks, bonds, others?		
Safe deposit box (location of box and key)		
Last will and testament and lawyer's/ executor's name, phone number and address		
Loans: credit cards, installment payments (list where to send payments, amount of payment, for how long, and when payments are due), others?		



Things to Find	Check When Found	Location of the Information
Income: insurance policies, trusts and benefits (life, casualty, death benefits, military, Social Security, credit union, 401(k) plan, monies received via wills/trusts, etc.), others?		
Income tax records- (federal, state, local)		
<b>Real Estate</b>		
Mortgages or rent information (debts on home, office, apartments, condominiums, businesses), others?		
Location of family treasures, jewelry, other items?		
Certificate of ownership for property, cars, boats, etc. and keys for these items		
Insurance policies (auto, real estate)		
Certificate of ownership, contract for cemetery plot		
Bills: utilities, phone, cable TV, internet services, taxes, etc.		

Suncoast Hospice can offer guidance and support as you adjust to the changes in your life. In addition to a listening ear, we can provide information about services and resources available to help you. Call Suncoast Hospice at (727) 586-4432.

To find a hospice near you, contact the National Hospice & Palliative Care Organization help line at (800) 658-8898, or visit [www.nhpco.org](http://www.nhpco.org).

### References:

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