Care documents checklist

You do not need the details on this page, only where each thing is. Names and rules vary by country and state, so ask a lawyer, solicitor or local aged-care service what applies. Keep this page somewhere safe.

Identity and basics

	Document	Where it is kept	Who has a copy
☐	Photo ID (driver's licence or passport)		
☐	Birth certificate and, if relevant, marriage certificate		
☐	Social security, tax file or national insurance number, kept securely		
☐	A list of key contacts: family, neighbours, close friends		

Health and insurance

	Document	Where it is kept	Who has a copy
☐	Health insurance, Medicare, Medicaid or other benefit cards		
☐	The current medication list		
☐	Names and contact details of doctors, specialists and the pharmacy		
☐	A summary of conditions, allergies and past surgeries		
☐	Recent test results, hospital discharge papers and referrals		
☐	Dental, vision and hearing details		

Legal planning

	Document	Where it is kept	Who has a copy
☐	A will, and where the original is kept		
☐	Power of attorney for finances		
☐	Healthcare power of attorney or healthcare proxy		
☐	Advance care directive or living will		
☐	Any funeral or end-of-life wishes		

Money and home

	Document	Where it is kept	Who has a copy
☐	Bank and investment account details, and who can access them		
☐	Pension and benefit statements		
☐	Property deeds, lease or mortgage papers		
☐	Home, car and other insurance policies		
☐	A list of regular bills and how they are paid		
☐	Details of any debts		

Care services

	Document	Where it is kept	Who has a copy
☐	Any aged-care or home-care assessments and plans		
☐	Service provider contacts and agreements		
☐	Records of any benefits applied for		
☐	Notes on conversations with agencies, with dates		

General information only, not medical, legal or financial advice. In an emergency, call your local emergency number.
Free from kinshipguard.com/free-printables. Kinship Guard is a shared care app for families on iPhone, iPad and Android.