

Insurance & Document Locator

Last updated: _____

Where the important papers are, so anyone helping can find them quickly. Fill in by hand.

Locations only. This sheet records where documents are kept, not the documents or any ID or account numbers. It does not replace official legal, medical, or advance-directive documents.

Name of the person I support: _____

Emergency contact & phone: _____

IMPORTANT DOCUMENTS *(where they are kept, not what they say)*

Document	Have it?	Where the original is kept	Where copies are (who has one)	Who to contact (name/phone, e.g., attorney)
Health care power of attorney <i>or health care proxy</i>	☐ Yes ☐ No ☐ Unsure			
Financial (durable) power of attorney	☐ Yes ☐ No ☐ Unsure			
Living will <i>or advance directive</i>	☐ Yes ☐ No ☐ Unsure			
POLST/MOLST or DNR order	☐ Yes ☐ No ☐ Unsure			
HIPAA authorization	☐ Yes ☐ No ☐ Unsure			
Will or trust	☐ Yes ☐ No ☐ Unsure			
Guardianship papers <i>if any</i>	☐ Yes ☐ No ☐ Unsure			
Photo ID or driver's license	☐ Yes ☐ No ☐ Unsure			
Birth and marriage certificates	☐ Yes ☐ No ☐ Unsure			
Military discharge (DD-214) <i>if they served</i>	☐ Yes ☐ No ☐ Unsure			
Deeds or titles	☐ Yes ☐ No ☐ Unsure			
Funeral or pre-planning arrangements	☐ Yes ☐ No ☐ Unsure			
Other	☐ Yes ☐ No ☐ Unsure			

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Private health information. Store securely.



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INSURANCE CARDS AND CONTACTS

Plan type	Company	Member services phone	Where the card is kept
Health insurance			
Medicare			
Supplemental or Medigap			
Part D drug plan			
Medicaid			
Long-term care insurance			
Dental or vision			
Other			

Phone numbers and card locations only. Do not write member, policy, group, or ID numbers here.

Tip: Keep a copy of the advance directive or POLST where emergency responders (EMS) can find it. Give copies to the health care agent and the doctors. Review these documents after major health changes.

OTHER PLACES TO KNOW

Where bills and statements are kept:

Who helps pay bills or manage paperwork (name & phone):

Safe, lockbox, or safe deposit box location, and who has the key:

Where digital or scanned copies are kept (no passwords):

Notes:

This sheet records locations only. For legal or financial questions, ask an attorney or the appropriate office; for health decisions, follow the care team.

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