

## IMPORTANT INFORMATION TO KNOW AND KEEP CURRENT

### Medical

- Information on all medical conditions and surgeries in the last five years.
- A list of medications, including the name, dose, and name of the prescriber.
- Names, contact information, and patient portal login and passwords for all health care providers (physicians, advanced practice nurses, hospitals, etc.)
- Name, phone number, and login information and password for pharmacy.
- Name and contact information for local professionals (i.e., care manager, therapist, etc.)
- Name, contact information, and the cards for all health insurance and medication plans.

### Insurance

A list of insurance policies, the carriers, the account / policy numbers, and names of beneficiaries.

### Utilities

Names, account number, and contact information for all utilities (electric, phone, cable, water, internet, etc.).

### Documents

- Safe Deposit Box (Location? Where is the key? Who has access?)
- Legal documents (wills, advance directives, trusts, powers of attorney, and all amendments, exhibits, attachments, and schedules, etc.).
- Location of important documents (i.e., birth certificates, naturalization papers, marriage certificates, death certificates, deed to home, mortgage).
- Social Security Cards
- Health insurance cards (Medicare, prescription discount, Medicare, supplemental, etc.)
- Driver's license or state ID

### Financial

- A list of all assets and debts (include dollar values).
- Monthly income.
- Monthly expenses.
- A statement of net worth.
- Information on bank accounts, other financial holdings, and credit cards

### Resources

National Academy of Elder Law Attorneys - [www.naela.org](http://www.naela.org)

National Elder Law Foundation - [www.nelf.org](http://www.nelf.org)

Aging Life Care Professionals Assoc. (Care Managers) - [www.caremanager.org](http://www.caremanager.org)

This information is not to be considered legal advice. The attorneys at Dutton Casey & Mesoloras concentrate in elder law, special needs planning, estate planning, guardianship, and probate matters and are here to assist you and / or someone you care about. Appointments are available in Arlington Heights, Chicago, Naperville, Skokie, and via phone or video conference.

Author: Erin C. Vogt, LCSW, CMC  
Client Coordinator  
Dutton Casey & Mesoloras, P.C.  
Phone: 312-371-0954 – cell  
Email: [evogt@duttonelderlaw.com](mailto:evogt@duttonelderlaw.com)

Phone 312.899.0950  
[contact@duttonelderlaw.com](mailto:contact@duttonelderlaw.com)  
[www.duttonelderlaw.com](http://www.duttonelderlaw.com)

65 East Wacker Place | Unit 1200 | Chicago, IL 60601  
Appointments are also available in Arlington Heights,  
Naperville, and Skokie, Illinois or via video  
conferencing or telephone.

