

# Get it all together – and SHARE IT!

These details belong to: \_\_\_\_\_

Date of last update \_\_\_\_\_

***Get it all together – and Share It!*** is a summary of key documents and tasks you should think about as you get older.

***Why do you need to think about this?*** Two main reasons→ 1) it helps you consider your assets and wishes, so you can assess your financial health as well as plan for possible physical health issues, and 2) it puts in one place the information others will need when you can no longer handle your affairs.

Print this document out, save it to your computer, email it to yourself, send it to your partner – whatever it takes to keep it in your mind and make sure it's current. Our lives change, so remember to review it once a year to update it. Important details change when you marry, divorce, buy a home, downsize, move, reorganize, etc.

***Have the conversation!*** It's not enough to just fill in the blanks, though that is very important. We need to talk to our loved ones about this information, and about what our wishes are if we are no longer able to communicate them.

## Location of legal documents

Will (and trusts) \_\_\_\_\_

Advanced Directive (Living will) \_\_\_\_\_

Power of Attorney \_\_\_\_\_

Medical Power of Attorney \_\_\_\_\_

Beneficiaries \_\_\_\_\_

### Notes:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

This document covers the basics, but add, edit, and delete as you need, based on what is happening in your life. Add more pages as necessary. Confirm you have the items on hand, and jot down below where they are located on the form. You may want to scan the documents with this form and save them on a flash drive.

**Remember:** Let one or two people you trust know where this information can be accessed if it is needed. Give this form and copies of other documents to the Personal Representative and Power of Attorney listed in your will, and keep a copy of this form with your other important documents (will, living will, policies and licenses, etc.)

**Your Basic information**

Full Name: \_\_\_\_\_  
(Other names) \_\_\_\_\_ )  
Mailing address: (street, city, state, zip) \_\_\_\_\_  
Street address: \_\_\_\_\_  
Phone(s): \_\_\_\_\_  
Email(s): \_\_\_\_\_  
Birth date: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
Employment (or date retired): \_\_\_\_\_  
Pet(s) \_\_\_\_\_

**Advisors**

Attorney \_\_\_\_\_  
Financial/investment advisor \_\_\_\_\_  
Insurance agent. \_\_\_\_\_  
Personal representative / Executor \_\_\_\_\_  
Clergy: \_\_\_\_\_

**In the event of my death, please contact**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Property I own (brief description, mortgage, if any, and amount still owed)**

\_\_\_\_\_  
\_\_\_\_\_

**Beneficiaries and bequests**

Beneficiaries: \_\_\_\_\_  
\_\_\_\_\_

**Bequests of personal items (list them here, or indicate location of your list):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Organizations I am a member of**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Boards I serve on**

\_\_\_\_\_  
\_\_\_\_\_

**Licenses and Policies (agent, contact info, and location of documents)**

Birth Certificate \_\_\_\_\_

Marriage Certificate (certified copy): \_\_\_\_\_

Home Insurance \_\_\_\_\_

Auto insurance \_\_\_\_\_

Umbrella insurance \_\_\_\_\_

Life Insurance: \_\_\_\_\_

**Banking and Business (bank names and contact info)**

Checking account(s): \_\_\_\_\_

Savings account(s): \_\_\_\_\_

Other bank account(s) \_\_\_\_\_

401k, IRA: \_\_\_\_\_

Stocks, CDs, other savings or retirement funds:

\_\_\_\_\_  
\_\_\_\_\_

College savings (529 plan) \_\_\_\_\_

Mortgage(s) \_\_\_\_\_

Debt (credit cards, school loans, etc.) \_\_\_\_\_

Account(s) on auto-pay (payee and how paid – credit card, bank account, other)

\_\_\_\_\_  
\_\_\_\_\_

**Passwords** (for your computer, online websites, airline mileage plan, utility companies, autopayments, other?) List here or indicate where they can be found

\_\_\_\_\_  
\_\_\_\_\_

**Medical and Health:**

Primary Physician \_\_\_\_\_

Specialist(s) \_\_\_\_\_

My medical records are located \_\_\_\_\_

**Health and life insurance policies (agent, company, and contact information)**

Life insurance \_\_\_\_\_

Health insurance \_\_\_\_\_

Dental \_\_\_\_\_

Visual \_\_\_\_\_

Audio \_\_\_\_\_

Long Term Care \_\_\_\_\_

Family members, friends, and neighbors who can answer questions or who should be notified in the event of my disability or death: (include phone and/or email)

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Obituary information (Parent's and siblings' names, your place of birth, education (high school, college(s), graduation date, major, employment history, resume?)

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Burial preference, prior arrangements

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### Legal Documents

**See individual state requirements for these documents  
and where they should be stored/deposited**

- **Power of Attorney** (durable power of attorney) - the authorization to represent or act on another's behalf in private affairs, business, or some other legal matter
- **Living Will (Advance Directive)** – a legal document in which a person specifies what actions should be taken for their health if they are no longer able to make decisions for themselves because of illness or incapacity
- **Medical Power of Attorney** (health care proxy) – the authorization to make medical decisions for a patient unable to make decisions regarding his/her own health
- **Will** (last will and testament) - a legal document that expresses a person's wishes as to how property is to be distributed at death, and names one or more persons, the executor (or personal representative in Alaska) to manage the estate until final distribution

Signature \_\_\_\_\_ Date \_\_\_\_\_

This form was prepared by Aging at Home Fairbanks using information from many different sources. We hope you find it useful. It will be made available on our website - [aahfairbanks.org](http://aahfairbanks.org)  
Aging at Home at Home Fairbanks, [aahfairbanks@gmail.com](mailto:aahfairbanks@gmail.com), 907-799-4026



## Get it All Together—And Share It!

### RESOURCE LIST

[www.getyourshittotogether.org](http://www.getyourshittotogether.org) Summarizes key docs and tasks that someone should do as s/he thinks about getting older

[www.theconversationproject.org](http://www.theconversationproject.org) Multimedia website focusing on helping people talk to loved ones and doctors about desires for end-of-life care

[www.fivewishes.org](http://www.fivewishes.org) Very simply written advance directive that helps record personal, spiritual, and emotional wishes for the end of life as well as medical wishes

[www.nhdd.org](http://www.nhdd.org) Website for National Health Decision Day, held annually, providing a good opportunity to discuss advance care planning with loved ones

[www.everplans.com/checklists](http://www.everplans.com/checklists) Resources for planning, organizing, and (for a fee), digital storage and safe access for end-of-life documents. Many of the document templates are state specific, and could be useful for seeing what needs to be documented

[www.caringinfo.org](http://www.caringinfo.org) National Hospice and Palliative Care website, links to brochures and resources, state-specific advance directives. Good article titled Conversations Before the Crisis

[www.nextavenue.org](http://www.nextavenue.org) 10 Things to Locate Before Your Parent Has a Health Crisis

[www.goodendoflife.com/worksheets/](http://www.goodendoflife.com/worksheets/) Includes plan for selecting advocates and a discussion guide for initiating end-of-life discussions. Also provides directions for prep of a medical emergency packet to be used in emergencies, containing important docs and medical history. Can download all Good End of Life files as a zip file from the website

[www.aarp.org/home-family/caregiving/end-of-life](http://www.aarp.org/home-family/caregiving/end-of-life) AARP has MANY links (some better than others), to help answer questions about wills, trusts, advance directives, probate, management of docs, finances etc. Good place to browse. See also Touching the Future, a downloadable AARP guide and workbook for will planning

[www.wiserwomen.org](http://www.wiserwomen.org) Website for the organization Women's Institute for a Secure Retirement; seeks to improve long-term financial security for all women through education and advocacy. Includes forms, guides and checklists to aid in planning for financial, health, and long-term care needs.

[www.firstcommand.com](http://www.firstcommand.com) Website for First Command Financial Services, offering banking, investment, and planning ahead services for military families and survivors. Outstanding planners' guide, Squared Away.

<https://newoldage.blogs.nytimes.com> Blogs on various timely topics on aging well

*Can't We Talk About Something More PLEASANT?* Roz Chast. A bittersweet book by *New Yorker* cartoonist Roz Chast about her last years with her parents.

WEBCAST [www.health.harvard.edu/martensen](http://www.health.harvard.edu/martensen). End of Life Care in America: A Doctor's Diagnosis

# Tying it all together

## A four-part series

The following series of meetings continues the workshop *Get it all together – and SHARE IT!* Let's take control of our lives and be prepared, as much as we can, for the coming years so we can enjoy time with family and friends knowing we've put our affairs in order. This is an evolving process for all of us, but doing the hard work before we need it will help us rest easy.

Topics for each of these sessions are suggestions, and speakers and attendees will be able to share information and ideas. We hope to make handouts available on the Aging at Home Fairbanks website, [www.aahfairbanks.org](http://www.aahfairbanks.org).

**Thursday, Oct. 26** Fairbanks Senior Center 3:30 pm

### **What do we need to do for ourselves NOW?**

A discussion of how we can take care of our own health and safety

- Is my home safe
- Who are the people in my support system
- Do they know how to access my home
- Have I signed up for Smart911
- Do I have a Plan B
- Have I started downsizing
- Have I had 'the conversation' with my family

**Thursday, Nov. 2** Fairbanks Senior Center 3:30 pm

### **Medical issues** – Advance Directives and the importance of making my wishes known to my loved ones

- How to fill out the Alaska Advance Directives form
- Having 'the conversation' in the hospital, as well as before
- Where should Advance Directives be filed so they can be accessed by medical professionals when they're needed

**Thursday, Nov. 16** Fairbanks Senior Center 3:30 pm

### **Legal issues** – Wills, trusts, probate, Medicaid

- What is probate and when is it needed
- Who is eligible for Medicaid
- Where should legal documents be filed so they can be accessed by my Power of Attorney and loved ones

**Thursday, Nov. 30** Fairbanks Senior Center 3:30 pm

### **Financial issues** -

- When living on retirement income (pension, Social Security, and/or savings) – what financial plans I can make now to be better prepared for my own future
- How can I prepare for the unexpected
- What about annuities, reverse mortgages, and spending down life insurance equity
- Who can access my bank accounts after I die, and when



Aging at Home Fairbanks [www.aahfairbanks.org](http://www.aahfairbanks.org) [aahfairbanks@gmail.com](mailto:aahfairbanks@gmail.com)