

IDENTIFY AND ORGANIZE YOUR PERSONAL AFFAIRS

This guide will help you **record the location** of current documents, contact persons, possessions and miscellaneous information that will be important to you and your loved ones when addressing financial and personal affairs, end-of-life decisions, etc. Recording one's wishes in advance will help to avoid confusion, uncertainty and conflict.

QUESTIONS TO CONSIDER

- 1) Who should be your personal guardian or representative if you are unable to manage your affairs on your own? Who should be executor of your estate after your death?
- 2) Who should receive your personal property (i.e., real estate, vehicles, household items, jewelry, artwork, guns, collectibles, etc.) after your death?
- 3) Do you have a Power of Attorney (POA) for Finance and Property? Who holds that Power? List current POA contact information (i.e., name, address, telephone number, e-mail and fax number, if applicable).
- 4) Do you have a Power of Attorney (POA) for Health Care/Advance Care Plan that makes your health care wishes clear? Have you discussed your wishes with your POA for Health Care, family, friends and health care professionals? The Advance Care Plan should include your wishes in regard to Do Not Resuscitate (DNR) orders and organ donation. List current POA contact information (i.e., name, address, telephone number, e-mail and fax number, if applicable).
- 5) Do you have special funeral instructions that indicate your wishes for burial (embalming, cremation, final location of remains), type of service (memorial, music, scriptures, flowers, etc.), obituary and what charitable organization(s) you would like to give to? Where are these instructions written down? Who should be notified upon your death?

The following pages will assist in identifying and locating important information needed if you are unable to manage your personal affairs.

PERSONAL AFFAIRS

Date of Completion _____

Name _____ DOB _____

Spouse/Significant Other _____ DOB _____ DOD _____

Guardian/Representative _____

Power of Attorney for Finance and Property _____

Power of Attorney for Health Care _____

Executor of Estate _____

PERSONAL DOCUMENTS

LOCATION

Current Wills _____

Power of Attorney for Finance and Property _____

Power of Attorney for Health Care/Advance Care Plan and/or Living Will _____

Do Not Resuscitate (DNR) Record _____

Authorization for Final Disposition _____

Prenuptial/Marital Agreements _____

Birth Certificate _____

Baptism/Confirmation Certificate _____

Marriage Certificates _____

Death Certificate _____

Divorce Decrees _____

Separation Agreements _____

Diplomas _____

Military Discharge/Benefits (VA ID#; Service Dates/Records) _____

Social Security Card _____

Medicare Card _____

Current Medicare Part D Plan _____

Health/Dental Insurance Card and Record _____

Trusts (Yours or if you are beneficiary for a trust) _____

Driver's License/Organ Donor Verification _____

PERSONAL DOCUMENTS - Continued**LOCATION**

Passport

Citizenship Certificate

Bank ID Cards

Credit Cards/Agreements

Employee Benefit Records

Safe Deposit Box (Bank/Number/Keys)

Other Personal Documents

MEDICAL CONTACTS**CONTACTS/LOCATION****(Current name, address, telephone number, e-mail and fax number)**

Doctors/Clinics

Practitioners (chiropractor, acupuncture, etc.)

Hospitals

Dentist/Oral Surgeon

Pharmacies

Other Medical Contacts

PROFESSIONAL ADVISORS**CONTACTS/LOCATION****(Current name, address, telephone number, e-mail and fax number)**

Attorney

Accountant/Tax Preparer

Banker

Stock Broker

Financial Planner

Real Estate Broker

Insurance Agent

Clergy

Funeral Home Representative

Other Professional Advisors

ASSET DOCUMENTS**LOCATION****(Current account, contract, certificate and invoice numbers)**

Real Estate (purchase, sale, deed records)	<hr/>
Land Abstracts/Titles (surveys, maps)	<hr/>
Mortgage/Rental Agreements	<hr/>
Funeral/Burial/Cemetery Agreements/Deeds	<hr/>
Leases	<hr/>
Vehicles (titles, purchase and sale receipts)	<hr/>
Notes (owed to you or you owe)	<hr/>
Home/Property Improvement Receipts (future Capital Gains)	<hr/>
Stock/Bond/Security Certificates	<hr/>
Savings/Checking Accounts/Certificates of Deposit	<hr/>
Current Cash on Hand	<hr/>
Other Asset Documents	<hr/>

INSURANCE DOCUMENTS**LOCATION****(Current premiums, value, maturity or surrender dates, etc.)**

Life Insurance/Annuity Policy	<hr/>
Homeowners Insurance Policy	<hr/>
Fire/Casualty Insurance Policy	<hr/>
Vehicle Insurance Policy	<hr/>
Health Insurance Policy	<hr/>
Long Term Care Policy	<hr/>
Disability Insurance Agreement	<hr/>
Other Insurance Documents	<hr/>

RETIREMENT DOCUMENTS**LOCATION**

Social Security	<hr/>
Pension (Employment, Railroad, Veterans)	<hr/>
Medicare	<hr/>
IRA/401K	<hr/>
Tax-Sheltered Annuity	<hr/>
Deferred Compensation	<hr/>
Other Retirement Documents	<hr/>

TAX AND BUSINESS RECORDS**LOCATION**

Income and Gift Tax Returns	<hr/>
Information for current year's taxes	<hr/>
Records of recent Security purchases/sales	<hr/>
Partnership Agreements	<hr/>
Stockholder Agreements	<hr/>
Stock Redemption Agreements	<hr/>
Business Continuation Agreements	<hr/>
Business Legal and Accounting records	<hr/>
Deferred Compensation Agreements	<hr/>
Real Estate Tax Bills	<hr/>
Other Tax and Business Records	<hr/>

INCOME INVENTORY**MONTHLY AMOUNT**

Wages/Salary	<hr/>
Social Security	<hr/>
Veterans Administration Pension	<hr/>
Pension (employment)	<hr/>
Interest (Checking, Savings, Loans)	<hr/>
Rental	<hr/>
Trust	<hr/>
Alimony	<hr/>
Stock Dividends	<hr/>
Annuity	<hr/>
Services Rendered	<hr/>
Other Income	<hr/>
TOTAL MONTHLY INCOME:	<hr/>

EXPENSE INVENTORY**MONTHLY AMOUNT**

Mortgage/Rent

Food

Electricity

Heat

Water/Sewer/Refuse

Telephones

Internet Access

Cable Access

Insurances (homeowners, renters, vehicles, etc.)

Association/Membership Fees

Church/religious donations

Real Estate Taxes

Vehicle Fuel and Maintenance

Yard Care/Snow Removal

Medical/Dental

Medical Co-Pays

Medications

Subscriptions

Credit Cards/Loans

Health Insurance Premium

Long Term Care Insurance Premium

Alimony/Family Support

Court-ordered expenses (guardian, attorney)

Personal Care

Pet Care

Other Expenses

TOTAL MONTHLY EXPENSES:

MISCELLANEOUS INFORMATION

CONTACTS/LOCATION

List User Names and Internet Passwords

(Facebook, e-mail, bank/credit union,
other online accounts, etc.)

Address Book (family, friends, etc.)

List and photos of personal possessions worth
\$500 or more (jewelry, artwork, guns, collectibles,
etc.) Identify known value or appraisal and
history of personal possessions.

List the location of all keys (house, garage, cottage,
mobile home, vehicles, safe deposit box, etc.)
and who holds extra keys

List all locks, their combinations and names of
those who know the combinations

List Religious and Community Affiliations

List Pet Care/Veterinarian

Other Miscellaneous Information

List of others who hold copies of this document:

(Name, relationship, address, telephone number and e-mail)

Discuss this document and your views with the person(s) whom you trust, who is willing to respect your views and values, who is able to make difficult decisions in stressful circumstances, who will closely follow what you want and will be a good advocate for you. It is advised that this document be reviewed every five (5) years or at the time of a life-changing event.

Additional copies are available at the Aging & Disability Resource Center (ADRC) serving Calumet, Outagamie and Waupaca Counties or online at www.yourADRCresource.org.

CALUMET COUNTY

206 Court St.
Chilton, WI 53014
920-849-1451
www.co.calumet.wi.us

OUTAGAMIE COUNTY

401 S. Elm St.
Appleton, WI 54911
920-832-5178
www.outagamie.org

WAUPACA COUNTY

811 Harding St.
Waupaca, WI 54981
715-258-6400
www.co.waupaca.wi.us