



Genesee County Office for the Aging

2 Bank Street, Batavia, NY 14020
585-343-1611/585-344-8559 (FAX)



Put Your Important Papers* in Order for You and Your Loved Ones

*NOTE: *Items* are Department of Social Services Required Documents for Medicaid Application*

IDENTIFICATION

- _____ *Birth Certificate*
- _____ *Naturalization Papers*
- _____ *Marriage Certificate*
- _____ *Divorce, separation, and/or support papers *
- _____ *Death Certificate for deceased spouse*
- _____ *Social Security Card*
- _____ *Verification of residence (ex. utility bill) (If in nursing home-residence prior to institutionalization)*
- _____ Driver's License

FINANCIAL

- _____ *Documented income verification-Wages, Social Security, Alimony, pension, etc.*
- _____ *Income tax forms* (past four years)
- _____ *Trust Funds (past five years) and current value verified*
- _____ *Open and Closed stocks, bonds, savings certificates (Obtain a record of cost basis and acquisition date. This is essential for completing a tax return if the security is sold.), mutual funds, IRA, annuities, pension statements, dating back five years* for Medicaid purposes (Before destroying older records, make sure you don't need them for something else)
- _____ *Open and Closed savings and checking account verification and bank statements dating back five years* for Medicaid purposes (Before destroying older records, make sure you don't need them for something else)
- _____ *Cemetery plot "Right to Burial", Pre-paid burial accounts, documented verification of current value*
- _____ *Property Deed*, Survey, and Abstract of Title to property documents (These items may be held by an attorney or title company), *Tax Bills* and Receipts
- _____ *Closing Statements on sold property dating back five years for Medicaid purposes* (Before destroying older records, make sure you don't need them for something else)
- _____ *Deed on any transferred property dating back five years for Medicaid purposes* (Before destroying older records, make sure you don't need them for something else)
- _____ *Receipts for funds used to pay privately in nursing home and/or hospital*
- _____ *Vehicle registration or title of all vehicles (including trailers, campers, motor homes)*
- _____ *Veteran Administration information-any Veteran's Pension for you, your spouse, or divorced spouse, discharge papers, and benefits payable on deceased person*
- _____ Employment benefit/pension/retirement plans
- _____ Credit card or other loans-account numbers, name and address of lender
- _____ User names and passwords for internet, bank, credit card accounts
- _____ List of current bills and where/how are they paid (ex. Utility, automatic payments out of bank accounts or credit cards)

INSURANCE

- _____ *Medicare Card and other Health Insurance Cards, **current payment receipts***
- _____ *Life Insurance Policies and current cash values*
- _____ *Disability/Long Term Care Insurance Policies, **current payment receipts***
- _____ Home Insurance Policies
- _____ Auto Insurance Policies
- _____ Personal Property Appraisals (antiques, jewelry, collections, etc.)

MISCELLANEOUS

- _____ Safe Deposit Box/es-which bank/s and where is/are the key/s?
- _____ Post Office Box/es-which branch, what PO Box #/s, and where is/are the key/s?
- _____ Inventory of shotguns, rifles, etc. (NOTE: If you need to dispose of any of these, we urge you to contact a licensed gun dealer to ensure appropriate legal consideration is taken)
- _____ Registration papers for pistols/pistol permit (NOTE: If you need to dispose of any of these, we urge you to contact the county sheriff’s department to ensure appropriate legal consideration is taken)
- _____ Name/s and Phone Numbers of Doctors, Pharmacy/ies, Lawyers, Accountants, Financial Advisors/Financial Planners
- _____ Name of Church/Synagogue, etc., and name of minister, priest, rabbi, etc.
- _____ Religious Preference is _____
- _____ Name of agency/agencies currently providing services (ex. Office for the Aging for Meals on Wheels, *Visiting Nurses for in home nurse/aide care, etc.) and **recent month’s out of pocket costs for service***
- _____ **UP TO DATE!!** Medications, Vitamins/minerals, Treatments (oxygen, breathing, skin care, etc.), Over the Counter (aspirin, Tylenol, Prilosec, Fish Oil, etc.) List

ADVANCE PLANNING

- _____ *Power of Attorney*, Guardianship, or Conservatorship papers
- _____ Health Care Proxy/Living Will
- _____ Organ Donation Information (i.e. your wishes upon your death)
- _____ Will
- _____ Hospital preference is _____
- _____ Funeral Home preference is _____
- _____ Burial preference is _____ Bury _____ Cremate _____ Donate Body to Research
- _____ Last wishes for funeral are _____
- _____
- _____
- _____

***Note: Some of the above documents may not apply to you**

These Are All Very Important Documents. It’s Important To Have One or More Persons Aware of Where They Are All Kept. It Is Also Important To Make Sure That The People You Are Giving This Information To Are The Right People. When Deciding Who To Share This Information With, Take These Questions Into Consideration:

- **Do I Trust This Person?**
- **Is This Person Willing To Do The Work And Spend The Time Handling My Affairs?**
- **Does This Person Understand My Feelings And My Point Of View?**
- **Will He Or She Follow My Wishes If I Am Ever Unable To Make My Own Decisions Or Take Care Of My Own Affairs?**

Talk to your family and let them know your wishes!

NOTICE

Genesee County Office for the Aging/NY Connects does not investigate the information provided in this checklist. The list is strictly a public service provided as a means of providing information to the community. We recommend that you consult with tax and legal advisors to ensure that your specific needs are being met.

IF YOU HAVE NOT DONE SO ALREADY, WE STRONGLY ENCOURAGE YOU TO SCHEDULE AN APPOINTMENT THROUGH NY CONNECTS/OFFICE FOR THE AGING AT 585-343-1611 TO FIND OUT MORE INFORMATION ABOUT LONG TERM CARE OPTIONS AND PLANNING FOR FUTURE NEEDS FOR GENESEE COUNTY SENIORS AND YOUNGER DISABLED PERSONS

Important Papers: Keep or Toss?

Power of Attorney (POA) Papers

If conducting any real estate transactions or if there are concerns that others might question the document, take the POA form to the County Clerk's office to have the POA recorded.

Keep original

Give copies to:

- Anyone whose name appears on the form
- All banking/financial institutions
- Any businesses or agencies that the POA will be doing business with
- Landlord/Long Term Facility Business Office if applicable
- Healthcare Providers
- Attorney if one has been used

Health Care Proxy (HCP) and Living Will (LW) Papers

Keep original

Give copies to:

- The healthcare agent/s whose name/s appear/s on the form
- All medical providers/institutions (nursing home, preferred hospital)
- Put copy in "Health File" and put on refrigerator

Attorney if one has been used

Consider enrolling in **Central Registry** (online copy of healthcare proxy) through United Memorial Medical Center

RECORDS TO KEEP	HOW LONG TO KEEP
Employment	permanently, keep updated
<i>Insurance Policies</i> Auto, Property, Health, Personal, Life	currently owned
Health Records	permanently, keep updated
Property Records Abstracts for Real Estate Burial Lot Deed Deed and Mortgages Household Inventory Automobile Titles, Guarantees, Warranties, Instruction Books	permanently, keep updated...keep a copy at home and one in safe deposit box currently owned, keep until item is sold or discarded
Financial Records Credit Cards Cancelled Checks-a Bank Statements-b Account Book Savings Passbook or Statements-c Tax Return	permanently, keep updated keep list of name and address of companies <i>a-at least 6 years for tax purposes</i> <i>b-at least 6 years for tax purposes</i> indefinitely <i>c-at least 6 years for tax purposes</i> keep copies of all federal, state & local tax returns
Legal Records Living Will Will Durable Power of Attorney	keep copies at home and in safe deposit box
Family Records Adoption Papers, Baptism & Confirmation Certificates, Citizenship Papers, Copyrights & Patents, Death Certificates, Marriage Dissolution Papers, Education Diplomas, Transcripts & Certificates, Marriage Certificates, Military Service Discharge Papers, Social Security Cards, Passports, etc	kept indefinitely ... keep in a safe deposit box or safe

Important Papers: Keep or Toss?

Retrieved January 21, 2010 from University of Nebraska:

<http://lancaster.unl.edu/home/Articles/2007/Importantpapers.shtml>

For more ideas about storing and organizing important papers, go to eXtension Foundation at:

http://www.extension.org/pages/Organize_Your_Important_Papers

PLANNING AHEAD - ADVANCE DIRECTIVES

New York State law provides several important methods through which caregivers may manage business, personal and medical care for a person facing disability:

POWER OF ATTORNEY (POA) - permits an individual (the principal) to appoint one or more persons as agent. An agent may handle most legal or financial transactions on behalf of the principal. Authority granted through a Power of Attorney may be general, or may be limited to a specific transaction such as banking. A Power of Attorney must be signed before a Notary by both the principal and all agents. These signatures may take place at different times and/or places. The Power of Attorney appointment becomes effective as soon as it is physically delivered to an agent. The law also provides for modifications such as delaying the agent's legal authority to a future date upon the happening of an event specified by the principal (example: doctor's certification of incapacity). If the Power of Attorney is to be used for any real estate transaction, it must be recorded with the clerk of the county in which the real estate is located. There is no time limit for such recording; old Powers of Attorney may be recorded at any time.

HEALTH CARE PROXY (HCP) - enables an individual to appoint a person to act as health care decision maker (proxy) in the event that he/she becomes unable to make health care decisions. An alternate agent may also be named, who may serve if the first-named person is unavailable or unable to serve. This proxy may make any health care decision that could have been made by the patient, including authorizing medical care, selection of care options, and refusing medical care. A proxy may refuse artificial nutrition and hydration (tube feeding and water) for a patient only if the patient's wishes in this regard are clearly known, preferably through written instructions.

LIVING WILL - a statement that a person does not wish to have certain extreme or heroic measures taken to prolong his/her life if ill with no hope of recovery. Although Living Wills are advisory rather than legally binding in New York State, they may serve as guidance for the attending physician, or as specific instructions for the person serving as Health Care Proxy.

DO NOT RESUSCITATE (DNR) ORDER - This Order directs medical providers not to perform cardiopulmonary resuscitation (CPR) if the patient's heart has stopped beating or if the patient has stopped breathing. Medical staff are required to attempt CPR regardless of a person's medical status unless a DNR Order is in place.

These all require signed, properly witnessed forms. It is important to note that a person cannot serve as a witness to a form that appoints him/her as agent or proxy. Advance Directives must be signed while the principal or patient is still competent, but will continue to be effective if he/she subsequently becomes incompetent. A Power of Attorney or Health Care Proxy ends on the death of either the principal or of all persons named as agents. The principal may revoke such an appointment at any time. Proper advance planning can avoid the time and expense of going to court for guardianship proceedings if a person becomes impaired.

Please call the Genesee County Office for the Aging at (585) 343-1611 and request a legal services appointment if you wish to arrange for a Power of Attorney, Health Care Proxy or Living Will.

David Dickinson Kaiser, Esq.
Legal Services for the Aging

10/2010