



1110 Navaho Drive, Fourth Floor, Raleigh, NC 27609
(919) 872-7933 • www.resourcesforseniors.com
Services and information for older adults and adults with disabilities
in Wake County, North Carolina

VITAL INFORMATION WORKSHEET

Last updated: February 2019

Keeping summary information in one place can be very helpful, especially if a family member needs to take over care unexpectedly. **Store this information in a safe location. Make sure your family members know where to find it, or give them a copy.** Review and update the information at least once a year, or whenever things change.

Basic Information

Date: _____
Name: _____
Social Security Number: _____
Emergency Contact Person: _____ Phone: _____

Healthcare Information

Medicare Number: _____
Supplemental Insurance: _____ Policy Number: _____
Medicaid Number (if applicable): _____

Doctors:

Name: _____	Specialty: _____
Address: _____	Phone: _____
Name: _____	Specialty: _____
Address: _____	Phone: _____
Name: _____	Specialty: _____
Address: _____	Phone: _____
Name: _____	Specialty: _____
Address: _____	Phone: _____
Name: _____	Specialty: _____
Address: _____	Phone: _____

Other healthcare providers:

Pharmacy: _____ Phone: _____
In Home Care Provider: _____ Phone: _____
Other: _____ Phone: _____

Legal and Financial

Item location:

Will _____
Durable Power of Attorney _____
Property Deeds _____
Living Will _____
Healthcare Power of Attorney _____
Safe Deposit Box _____
Key to Safe Deposit Box _____
Other _____

Financial contacts:

Attorney: _____ Phone: _____
Accountant: _____ Phone: _____
Broker: _____ Phone: _____

Accounts:

<i>Institution or broker</i>	<i>Location of statements</i>
Checking _____	_____
Savings _____	_____
Money Market _____	_____
IRA _____	_____
401K _____	_____
CD _____	_____
CD _____	_____
Stocks _____	_____
Bonds _____	_____
Other _____	_____
Other _____	_____

Insurances:

<i>Company</i>	<i>Location of policy</i>
Long Term Care _____	_____
Disability _____	_____
Life _____	_____
Homeowners/Renters _____	_____
Automobile _____	_____
Other _____	_____