

## **What Your Financial Power of Attorney and Executor Need to Know**

Presented by Debbie Bell, May 2019

### The basics:

- Full legal name
- Social Security number
- Date of birth
- Place of birth (city & state)
- Father's full name
- Mother's full maiden name

### If you have pets:

- Name(s) and age(s)
- Has someone agreed to take them if you're no longer able? (name and contact info.)
- If not, names and contact info for people who could temporarily take care of pet(s)
- Dietary habits, any medical conditions, name of your vet

### Access to your home:

- Give keys to your POA and/or Executor
- Who has keys
- Where keys are hidden
- If you have an alarm system, how it works

### Where to find your important legal documents:

- Wills and Trusts
- Powers of Attorney (financial and health)
- Living Will
- Designation of agent to arrange your funeral and disposition of your remains
- Funeral instructions and burial plot deed, if applicable
- Birth, Marriage and Death Certificate
- Military service information and discharge papers

### Who are your agents?

- Financial Power of Attorney
- Health Care Power of Attorney (Health Care Proxy)
- Agent to arrange your funeral, burial or cremation
- Executor

### Relatives/friends to notify

### People who take care of your home:

- Superintendent, landlord, cleaning person, landscaper, plumber, electrician, handyman.

(over)

Health insurance (company, account numbers):

- Medicare
- Medicare Advantage or Supplemental (Gap) policies
- Part D (prescription) plans
- Other insurance -- vision, ears, dental, cancer, etc.
- Long-term care insurance

Your professionals:

- Lawyers, accountants, financial planners, clergy, doctors, dentists, others

Car(s) and real estate:

- What do you own/lease or rent?
- Where are deeds, contracts, car titles, car keys?

Your computer and paper files:

- Where to find your paper files
- How to access your computer – logins and passwords, or where to find them.

Credit cards:

- Account numbers; expiration date; security code.

Bills that are paid regularly – e.g., rent, utilities, subscriptions

- How are they paid? by check, online banking, charged to credit cards?
- Are there recurring charges – memberships, "Help I've Fallen" devices, subscriptions, etc.
  - that are billed automatically and need to be cancelled.

Your financial assets

- Pensions, annuities and other regular sources of income
- Institutions where you have accounts – banks, brokerage, etc.
  - Types of accounts – CDs, savings, etc. and account numbers
- Life insurance policies (institution, contact info, policy numbers)
- Recent income tax returns

Outstanding debts, if any

Do you have any items of monetary or sentimental value?

Are there items that you would like certain friends or relatives to have?

Resource:

Judith Gorman, [A Simple Guide for Orchestrating Your Life as You Age](#), 2017

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Creative Aging in Nyack

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