



Stillwater

HOSPICE

formerly Visiting Nurse

Your Personal Information Log

Planning for today ... and tomorrow

Planning for the future

No one ever plans to become sick or disabled. Yet, it's the kind of planning that can make all the difference in an emergency situation. Putting all your important personal information in one place can help first responders, your medical team, and your family members find important information quickly and easily.

What exactly is an “important paper”?

The answer to this question may be different for every family. This is simply a starting place. You may have other information to add (for example, if you have a pet, you'll want to include the name and address of your veterinarian).

Personal Records include:

- Full legal name
- Social Security Number
- Legal residence
- Date and place of birth
- Names and address of spouse and children
- Location of birth and death certificates
- Location of certificates of marriage, divorce, citizenship and adoption(s)
- Employers and dates of employment
- Education and military records
- Names and phone numbers of religious contacts
- Names and phone numbers of close friends, relatives, doctors, lawyers and financial advisors
- Medications taken regularly (be sure to update these regularly)
- Location of living will and other legal documents



Financial Records include:

- Sources of income and assets (employer, pensions, IRAs, 401(k)s, etc.)
- Social Security and Medicare/Medicaid information
- Insurance information (life, health, long-term care, home, car) with policy numbers and agents' names and phone numbers

Financial Records include: (cont.)

- Names of your banks and account numbers (checking, savings, credit union)
- Investment income (stocks, bonds, property) and stockbrokers' names and phone numbers
- Copy of most recent income tax return
- Location of your most up-to-date will with an original signature
- Liabilities, including property tax—what is owed to whom and when payments are due
- Mortgages and debts—how and when they are paid
- Location of the original deed of trust for your home
- Car title and registration
- Credit and debit card names and numbers
- Location of safety deposit box and key

The following pages will help guide you to getting your important information into one place. You may want to make extra copies of this to give to your next of kin or other close family members. Remember to update the information at least annually to reflect changes in your personal affairs.



For more information about getting your affairs in order:

AARP

1-888-687-2277 (toll-free)
1-877-434-7598 (TTY/toll-free)
1-877-342-2277 (Español/linea gratis)
1-866-238-9488 (TTY/linea gratis)
member@aarp.org
www.aarp.org/health

CaringInfo

National Hospice and Palliative Care Organization
1-800-658-8898 (toll-free)
caringinfo@nhpco.org
www.caringinfo.org

Centers for Medicare & Medicaid Services

1-800-633-4227 (toll-free)
1-877-486-2048 (TTY/toll-free)
www.medicare.gov

Eldercare Locator

1-800-677-1116 (toll-free)
www.eldercare.gov



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Personal Information

Full name: _____

Address: _____

Date of birth: _____

Place of birth: _____

Names of parents: _____

Maiden name: _____

Date of marriage: _____

Location of marriage/divorce certificate: _____

Social Security/Tax ID Number: _____

Driver's license state and number: _____

Passport number: _____

Next of kin details:

Name: _____

Address: _____

Phone number(s): _____

Occupation: _____

Work address: _____

Work phone: _____



Family

Relationship	Name	Contact information

Health and Medications

include any ongoing medication conditions and allergies

Condition	Medication	Physician treating

Special Needs

include any special instructions in the case of your death

Pet(s) name(s):

Veterinarian contact information:

Pets medications and instructions:

OTHER INSTRUCTIONS:

Location of important documents/items

Birth certificate	
Marriage certificate	
Social Security card	
Driver's license	
Passport	
Bank book/ statements	
Will	
Medicare/Medicaid cards	
Safe (location and combination)	
Valuables e.g.: jewelry, guns, antiques List:	



Financial Information

Bank accounts	Account details	Account numbers	Bank address/ contact information

Schedule of Regular Payments

include direct debits/standing orders from your bank and investment accounts

Details	Amount	Frequency	Bank/account

Credit Cards

include Visa, Amex, MasterCard, Discovery and store cards

Card provider	Address and contact number	Card number/ expiration date

Utility Companies

	Name of supplier	Account/reference number
Gas		
Electricity		
Water		
Telephone		
Cell phone		
TV/Internet		
Others (newspaper, lawn care, etc.)		



Insurance Companies

Type of insurance	Name of insurance company	Account number/ reference number	Address and contact details
Life insurance			
House insurance			
Car insurance			
Health/long-term care insurance			
OTHER			
OTHER			



Government

benefits such as disability, income support, Social Security, etc.

Details	Contact information	Account/reference number

Loans: Mortgages

Mortgage provider: address & contact information	Account number	Repayment	Mortgage amount and term

Further details on Mortgage(s):



Other Loans/Leases

cars, student loans, furniture

Name, address & contact number of company	Account/reference number	Details of loan: amount, repayment details



Investments, Stocks and Shares

Details of portfolios	Account/reference number	Address and contact numbers



Pension Providers

Name, address & contact number of company	Account/reference number	Other details

Loyalty Cards

store cards, frequent flyers, hotel cards

Card provider	Account/reference number	Address and contact information



Last Will and Testament

Is there a Will?	
Where is the Will kept?	
Name, phone number, email and address of the person who holds the will, if with an attorney, family member or friend	
When was the Will made / last updated?	
Who are the Executors named in the Will?	
Details of 1st Executor: Name: Address: Contact number/ Email address:	
Details of 2nd Executor: Name: Address: Contact number: Email address:	
Is there a Guardian appointed for Children in the Will? Name and address: Contact number/ Email address:	



Living Will

Is there a Living Will?	
Where is the Living Will kept?	
Name and address of the person who holds the Living Will, if with a friend or attorney	

Discretionary Will Trust

Is there a Discretionary Will Trust?	
Where is this stored?	
Name and address of the person who holds the Discretionary Will Trust, if with a friend or attorney	

Enduring or Lasting Power of Attorney

Where is the Enduring or Lasting Power of Attorney stored?	
Name and address of the person who holds the Power of Attorney, if with a friend or attorney	



Organ Donation

I wish to donate my organs Y / N

Funeral Planning

Prepaid funeral or funeral plan details:

Name of provider: _____

Address: _____

Contact details: _____

Reference/account number: _____

If no plan in place:

Details to consider

I wish to be buried / cremated	
I wish my funeral service to be at:	
Where I would like to be buried / ashes placed	
The music I would like to be included in the service	
Special readings or hymns	
I would like the following persons to conduct the service if possible.	
Other details I would like e.g.: flowers, donations to named charities, people to be informed.	



Passwords

Below is a list of passwords to various online accounts.

Account	Web address	Password

Notes



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Notes



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The information enclosed in this handout is valuable. Keep it in a secure location that you disclose only to a trusted relative or friend. This is not a legal document. If you have questions about your final wishes, please consult an attorney who specializes in end of life issues.

Stillwater Hospice has cared for people with serious illnesses and their families in northeast Indiana since 1888. Our interdisciplinary team of hospice experts ensures that every patient is treated with dignity and respect. Stillwater Hospice provides compassionate care to alleviate suffering and ensure quality of life for those affected by serious illness. We care for those who go on living as well. Our grief services are available at no charge for any adult who has experienced the loss of a loved one.

We proudly serve the following Indiana counties: Adams, Allen, Blackford, DeKalb, Grant, Huntington, Jay, Noble, Wabash, Wells and Whitley.

Main Office: Fort Wayne

5910 Homestead Road
Fort Wayne, IN 46814

Berne

108 S Jefferson Street
Berne, IN 46711

Marion

705 S Baldwin Avenue
Marion, IN 46953

Phone: (260) 435-3222 • Toll-free: (800) 288-4111
www.stillwater-hospice.org • info@stillwater-hospice.org

Nursing and Patient Referral Line:

24 hours a day, 7 days a week

Administrative Office Hours:

8 a.m.-5 p.m. Monday-Friday

We provide compassionate care to all persons, regardless of race, age, creed, sexual orientation or nationality. Translation services available upon request. To make a difference in the lives of Stillwater Hospice patients and families, consider making a gift to the Stillwater Hospice Foundation. Please visit www.stillwater-hospice.org/donate or call (260) 435-3222.