



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

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 _____	_____