



Senior Legal Hotline

444 North 3rd Street #312 ♦ Sacramento, CA 95811

Telephone: (916) 551-2140 ♦ Toll-free: (800) 222-1753

Fax: (916) 551-2197 ♦ www.seniorlegalhotline.org

Hours: Monday - Friday, 9 to 12 and 1 to 4; Thursdays to 7 p.m.

SENIOR LEGAL CHECK-UP

This checklist is provided for your convenience. It is a handy way to help you remember to keep important documents close at hand. **It is for your use: Please do not return it to the Senior Legal Hotline.**

We suggest that you place the checklist in an envelope posted on your refrigerator or by your telephone clearly stating, "IMPORTANT PAPERS." While you might want to keep actual legal documents in another safe place, perhaps with a trusted friend or relative, putting this checklist in an accessible place will help others locate any of the listed items if you become incapacitated.

Name _____ Social Security number ____ - ____ - ____

Spouse's Name _____ Social Security number ____ - ____ - ____

Address _____

Date _____ Copies of this list given to _____

<u>ITEM</u>	<u>DATE SIGNED</u>	<u>LOCATION OF DOCUMENT</u>
My will	_____	_____
Spouse's will	_____	_____
Living trust	_____	_____
Power of attorney for finances	_____	_____
Advance health care directive	_____	_____

	<u>POLICY/ACCT. NO.</u>	<u>LOCATION OF DOCUMENTS</u>
Health insurance policy	_____	_____
Life insurance policy	_____	_____
Home loan – first	_____	_____
Home loan – second	_____	_____
Other loans _____	_____	_____
Pension/retirement	_____	_____
Passport Number	_____	_____
Birth certificates	_____	_____
Marriage certificates	_____	_____

Children's birth records _____
Divorce/separation orders _____
Funeral arrangement information _____
Income tax returns _____
List of bank/investment accounts _____
List of credit cards _____
Other: _____

Cars owned:

Make _____ Model _____ Year ___ License No. _____ VIN _____

Make _____ Model _____ Year ___ License No. _____ VIN _____

Insurance company _____ Policy #(s) _____

Location of pink slip(s) _____

IMPORTANT NAMES, ADDRESSES AND PHONE NUMBERS

Emergency contacts _____

Doctor(s) _____

Minister _____

Attorney _____

Accountant _____

Insurance agent(s) _____

Others _____

Items out on loan _____

Items borrowed from others _____

If you are over 60 in California, you can get free advice by phone from the Senior Legal Hotline regarding any other legal issue. Call (916) 551-2140 in Sacramento or (800) 222-1753 toll-free in California, Mon.-Fri. 9 to 12 and 1 to 4, until 7 p.m. Thursdays. You can also submit your question by e-mail from our web site, www.seniorlegalhotline.org. The Senior Legal Hotline is a project of Legal Services of Northern California, a nonprofit public service agency, supported by the Administration on Aging (U.S. Dept of Health and Human Services), California Department of Aging, Area 4 Agency on Aging, grants and voluntary donations.