

Documentation Log

Date:

Location:

Goals:

NO	PERSONAL/HEALTH/FINANCIAL	NO	UTILITY/CONTACTS/MISC
1	Birth certificates	21	Utility contact numbers
2	Social Security cards	22	Utility account numbers
3	Marriage certificates	23	Contact - friends, neighbors
4	Divorce decrees	24	Contact numbers - physicians
5	Citizenship or naturalization	25	Contact - legal & financial
6	Health insurance cards	26	Safe deposit box location
7	Medicare or Medicaid cards	27	Stored: education certificates
8	Prescription drug coverage	28	Stored: military records
9	Living will, healthcare POA	29	Stored: passwords and logins
10	Do-not-resuscitate (DNR)	30	
11	medical history, medication list	31	
12	Bank account information	32	
13	Investment account statements	33	
14	Pension or Social Security	34	
15	Tax records	35	
16	Insurance policies	36	
17	Property deeds or titles	37	
18	Vehicle registration & insurance	38	
19	Mortgage & Property tax	39	
20	Home maintenance records	40	