



ORGANIZING YOUR IMPORTANT DOCUMENTS

The Advocacy Center (AC) is a statewide non-profit agency providing free legal services to senior citizens and persons with disabilities.

Review and update important documents at least once a year. Keep your records in a safe place, such as a fireproof box. It is a very good idea to tell someone you trust where these important papers are kept. To assist you in organizing your records, we have prepared the following list of important documents:

- **Social Security Card:** Keep your Social Security card in your wallet. If you lose it, contact the Social Security Administration.
- **Medicare Card:** Keep your Medicare card in your wallet. If you lose it, contact the Social Security Administration.
- **Medicaid Card:** Keep your Medicaid card in your wallet. If you lose it, call the Medicaid Eligibility office in your parish.
- **Health Insurance Policy and Identification Card:** Keep your health insurance identification card in your wallet. If you become eligible for Medicare/Medicaid, review your policy to see if you still need the coverage that you have.
- **Power of Attorney (Procurator or Mandate):** Review with your attorney each year to determine if it needs to be updated.
- **Living Will:** Contact your attorney each year to see if it needs to be updated. An up-to-date copy should be kept by your doctor and a trusted friend/relative.
- **Will:** Review each year with your attorney to see if it needs to be updated.
- **Birth and Marriage Certificates:** These are most commonly needed in matters dealing with Social Security (benefits under your own or spouse's work record). If you need one, contact the Bureau of Vital Statistics in New Orleans at 504-568-5152 or 1-800-454-9570.
- **Death Certificates of Spouse or Family Members:** These may be needed (a) for successions, (b) if bills were owed by the deceased and there must be proof of death, or (c) when applying for the Social Security death benefit check.
- **Burial Policies – Pre-need and Insurance Types:** **(a) Pre-need:** This is the type of policy where you choose the goods and services you want, such as embalming, casket, direct cremation. **(b) Insurance:** You pay a small premium every month for this type of policy. Upon your death, the policy will pay benefits to the funeral home or to the person of your choice.
- **Last Wishes List:** If you have specific wishes regarding funeral arrangements, put them in writing and keep the list with your burial information. Do not put this information in a will.
- **Medical Bills for Deceased Family Member(s):** These may be necessary in a succession to prove the debts of the estate.
- **Judgment of Divorce:** This may be needed in matters of inheritance or succession. Copies may be obtained from the Clerk of Court's office in the parish in which the divorce was granted.
- **Pension Plans:** If you belong to a pension plan, keep copies of the plan and any supporting documents.
- **List of Bank Accounts:** Include the name and address of the bank, account number, and the name of the account.
- **List of Safety Deposit Boxes and Their Contents:** This list should identify the location of the box and box number.
- **Investments:** Keep a list of your investments such as money market accounts, stocks, bonds, certificates of deposit, and mutual funds.

- **Automobile Insurance Policy:** State law requires all autos to have liability insurance and each driver to carry proof of this coverage in his/her auto.
- **Homeowners Insurance Policy:** You should have homeowners' insurance. If you own your own home and someone gets hurt while on your property, you may be responsible for damages.
- **Deeds and Acts of Sale:** These are legal papers showing ownership. Copies may be obtained from the local courthouse in the mortgage/conveyance office.
- **Mortgage and Mortgage Payment Records:** Keep a copy of any mortgage. Keep a list of when payments are due and where payments are sent. Coupon books should be kept with this list as well as receipts or cancelled checks as proof of payments.
- **Home Improvement Contracts:** Keep copies of any papers that you sign. Get everything in writing including estimates, contracts and guarantees. Make sure you understand all of the work to be done and the cost/payment plan.
- **Loan Papers:** Keep copies of papers that you sign when you take out a loan. These include disclosure statements, truth in lending forms, and contracts. Read the papers carefully before you sign to make sure that you can afford the loan payments.
- **General Warranties and Guarantees:** These include warranties and guarantees on autos, appliances, auto parts, etc.
- **Leases and Rental Agreements:** If you rent or lease anything (i.e. home, apartment, car), keep a copy of the lease or agreement. Read it carefully before you sign to know your rights and responsibilities
- **List of Credit Cards:** Keep a list of all the credit card account numbers and telephone numbers to call if cards are lost or stolen.
- **Judgments of Possession (from Succession):** This document states who inherited property from the deceased.
- **Acts of Donation:** This is written proof of legally donated gifts or received gifts.
- **Library Cards:** Advise library if your card is lost or stolen. Keep a list of libraries at which you have cards.

For Assistance:

Call: TOLL-FREE 1-800-960-7705 (voice and TDD)

Write: 225 Baronne St. Suite 2112, New Orleans, LA 70112-1724

Visit our website: www.advocacyla.org

AC has offices in New Orleans, Baton Rouge, Lafayette, and Shreveport

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