

**WHERE IS IT?**  
**Privacy and security issues**  
**for people facing serious illness**

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Editor

*“If I could have 10 more minutes with a person before their memory failed or before they died, I could alleviate a lot of family concerns about their security.”*

Family Law Attorney

When a person is unable to provide critical personal information due to disease, aging or death, the welfare of surviving family members may suffer. This tool is designed to identify a range of personal information that would be useful for family caregivers or survivors to have, but not all of the items may be relevant. This is merely a guide that you can customize for your own purposes.

For example, many people might want to make sure their next of kin know where to find their safety deposit boxes or where computer passwords are stored. They would fill out those sections.

Others may wish to not write any locations down, but merely review the list with a person they trust.

Still others might write the name of the person who knows the location of a specific item, rather than identify the location in print. Keep in mind, however, they may pre-decease you.

When you are seriously or chronically ill, there are many questions to be addressed similar to the locations of critical information. The following are examples:

1) Privacy. Discuss with your family the degree of privacy you prefer during illness. Would you consider using an online vehicle for keeping people up to date with treatments

and changes in health to make sure everybody gets the same message and your caregiver doesn't have to keep repeating it?

2) Primary contacts. Whom do you want notified if there's a major change in your health status or when you pass away?

3) Items due. When are key payments, such as mortgage or car payments, due? Are you enrolled in any online automatic deduction programs?

4) Do you have photos, journals, art or furniture that would be of value to the local historical society or a museum? This is easily overlooked by family members overwhelmed by grief as they distribute your possessions.

5) Digital estate. So much of our personal information and finances are increasingly online, and if you die unexpectedly, someone needs to know how to access your computer, your phone and any other devices where you access banking, credit card information, investment statements, tax returns, and photos.

NOTE: This document should only be shared with those you trust, such as your spouse, domestic partner or other especially close person, estate attorney, executor or trustee. Every person filling it out must be aware of their own confidentiality risks and take steps to ensure its security. This document should be stored in a secure location.

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Name \_\_\_\_\_ Date: \_\_\_\_\_

**CERTIFICATES AND LEGAL DOCUMENTS**

ITEM	LOCATION	COMMENT
Social Security Number		
Will and Executor		Name:
Trust Documents		
Power of Attorney Documents		Name(s):
Birth Certificate		
Prenuptial Agreements		
Marriage License; Domestic Partner/ Civil Union Certificate		
Divorce Decree		
Adoption Certificate		
Guardian Records for Minor		

Name \_\_\_\_\_ Date: \_\_\_\_\_

## PERSONAL

ITEM	LOCATION	COMMENT
Memorial or funeral preferences		
Instruction regarding the disposition of my diaries and photographs:		
Instruction regarding the disposition of personal materials not addressed in my Will:		
Location of adult materials to be discarded:		
Address books, physical or online		
Computer files: Passwords Special instructions		
Keys Car Home File cabinets		Who else has keys to your home?
Off-site storage locations		
Safety Deposit boxes at:		Who else has keys?

Name \_\_\_\_\_ Date: \_\_\_\_\_

Combination Lock codes		
Safe codes or keys		
Firearms		
Family History or Genogram		
Diplomas, Honors, Awards		
Recorded oral history		

Name \_\_\_\_\_ Date: \_\_\_\_\_

## FINANCIAL

ITEM	LOCATION	COMMENT
Accounts at the following Banks or Credit Unions:		
Retirement, pension and annuity records		
Other investment records or trading information, such as online trading site		
Primary and secondary Health Coverage through:		
Life Insurance		
Car Insurance		
Property Insurance		
Hidden cash locations		
Outstanding personal loans to:  Outstanding personal loans from:		
Property deeds and titles		

Name \_\_\_\_\_ Date: \_\_\_\_\_

Car and boat titles		
Business agreements and partnerships		
Assets outside of trusts:		
Provenance files of significant antiques and artwork		

Name \_\_\_\_\_ Date: \_\_\_\_\_

## HEALTH CARE

ITEM	LOCATION	COMMENT
Advance Directives		Date last written:
Power of Attorney for Health Care		Name:
Living Will		
Physician Directives (POLST)		
Disposition of Remains		
Mortuary Documents		Prepaid: Y or N
Medical Record ID numbers		
Organ Donor card?		

Name \_\_\_\_\_ Date: \_\_\_\_\_



Principal contacts	Name and contact info
Primary physician	
Surgeons and specialists	
Primary pharmacy service	
Estate attorney	
Other attorneys	
Accountant	
Veterinarian - Files on pets?	
Agent/publicist	
Galleries representing/ holding your artwork	

Name \_\_\_\_\_ Date: \_\_\_\_\_