Important Documents

Seniors should have important documents organized and at hand. These need to be available for a variety of reasons. Backup documentation is essential for proper preparation of income tax returns. This will assure that the senior is able to take advantage of all legitimate tax deductions, and if the IRS ever decides to do a random audit, everything will be there to prove the legitimacy of the return. Also, the less work that the tax preparer is required to do, the less the senior should be charged in accounting fees. In addition, if someone else ever needs to act on behalf of the senior in the event of an emergency, everything is at hand and the helper will not have to go searching for what it needed.

Examples of important documents include:

- A list of immediate family and contact information
- Powers of Attorney - General, Limited and/or Durable Medical
- Documents for any Trusts you may have established
- Last Will and Testament and Living Will
- Medical and dental records (including shot records and prescriptions)
- Pet records
- Vehicle information
- All insurance policies:
  - Auto
  - Homeowners
  - Umbrella (liability)
  - Medical (including Medicare and Medicaid)
  - Long Term Care
  - Disability
  - Dental
  - Vision, and
  - Life
- Group benefits packages still in effect
- Most current tax return
- Most current pay stub, if applicable
- Most current Social Security statement
- Most current statements for any active bank accounts (including safe deposit box)
Most current statement for any CDs plus the actual certificates themselves
Most current statement for any IRA, annuity, or old retirement plan
Most current statement for retirement or pension programs
Most current statement for any investment accounts
Promissory notes for any money owed to you and by you
Real property information – a current mortgage statement or rental lease
Current statements for all loans including credit cards, auto, student loans, etc.
Birth certificates
Marriage certificates
Adoption papers
Citizenship papers
Passports with any required visas
Court orders – such as divorce, child support, custody, etc.
Most recent utility bills for each utility

It is very important that vital records be properly organized so that in the event of any type of evacuation, they will not be lost or left behind. Whatever method of storage is decided upon, do remember that all of these documents need to be taken. If records are stored in a filing cabinet, then a portable “to go” box should be stored nearby so that files may be transferred quickly and easily when an evacuation has been ordered. A summary sheet listing all documents and which individuals have been appointed as POA’s, Trustees, and Executor should always accompany any senior being evacuated, so if an emergency should arise during an evacuation, the proper person could be notified. This is why the list of immediate family and contact information is so important.

Disabled seniors should also be aware of the Functional and Medical Needs Registry that has been set up for use during evacuations. This Registry is made up of residents who may require transportation and medical assistance and have no other resources such as family, friends, neighbors, or church members to help them if they must evacuate when a hurricane is threatening our area. These residents must apply and then qualify to be on the Registry. To apply, residents should call the Chatham County Health Department at 912-353-3255. Or the application can also be downloaded from the Coastal Health District website at www.gachd.org/emergency-preparedness. When the form has been completed, it can be mailed to the Chatham County Health Department, and you will be notified shortly after your application is received regarding your Registry status. If
you think you may qualify for the Registry, apply now. The application process is open year round. Please do not wait until a storm is threatening to register; do it today. The address to which the application should be mailed is:

Functional and Medical Needs Coordinator
Chatham County Health Department
1395 Eisenhower Drive
Savannah, GA 31406

Please note that residents of nursing homes, assisted living facilities, personal care homes, and hospitals are not eligible for this service and must follow their facility’s emergency plan.