TEMPLATE B

Document Vault Index

Document	Exists?	Signed	Location	Digital copy	Person(s) named	Copies to	Review date
Financial power of attorney (POA)							
Healthcare power of attorney (POA) / proxy							
Living will / advance directive							
Health Insurance Portability and Accountability Act (HIPAA) authorization							
Physician Orders for Life-Sustaining Treatment (POLST) / Medical Orders for Life-Sustaining Treatment (MOLST) / do-not-resuscitate (DNR)							
Will							
Revocable trust							
Medicare authorization form (CMS-10106)							
Social Security Administration (SSA) representative payee (if any)							
Internal Revenue Service (IRS) authorization forms (ask the tax preparer)							
Funeral wishes (Template O) / preneed contract							
Cemetery deed							
military discharge papers (DD-214), if a veteran							
Disability parking placard							
Utility medical-equipment registration							

Column key: *Exists?* is Y or N. *Signed* is the date signed. *Location* is where the original is kept. *Digital copy* is the folder and file name. *Person(s) named* are the people named on the document. *Copies to* is who has a copy. *Review date* is the review or expiration date. This is an inventory; ask the attorney (Chapter 3.2) what each document means.