



Helpful Resources

Having current and complete copies of important documents can guide caregivers should they need them.

By organizing key documents, you can help save loved ones stress, and provide direction to help ensure your wishes are followed.

Document Your Important Information

As you work with your financial representative to plan for life's events, use this section to help keep track of important contacts, document locations, and other information.

Personal Contacts

ACCOUNTANT/TAX PREPARER		ACCOUNT NO.
FIRM	PHONE	EMAIL
ATTORNEY		ACCOUNT NO.
FIRM	PHONE	EMAIL
ESTATE EXECUTOR/PERSONAL REPRESENTATIVE		ACCOUNT NO.
FIRM	PHONE	EMAIL
FINANCIAL REPRESENTATIVE/WEALTH PLANNER		ACCOUNT NO.
FIRM	PHONE	EMAIL
GENERAL INSURANCE AGENT		ACCOUNT NO.
FIRM	PHONE	EMAIL
LIFE INSURANCE AGENT		ACCOUNT NO.
FIRM	PHONE	EMAIL
POWER OF ATTORNEY/EXECUTOR		ACCOUNT NO.
FIRM	PHONE	EMAIL
TRUSTEE		ACCOUNT NO.
FIRM	PHONE	EMAIL
OTHER		ACCOUNT NO.
FIRM	PHONE	EMAIL

Medical Contacts

PRIMARY CARE PHYSICIAN

OFFICE PHONE EMAIL

DENTIST

OFFICE PHONE EMAIL

OPTOMETRIST

OFFICE PHONE EMAIL

PHARMACIST

OFFICE PHONE EMAIL

SPECIALIST

TYPE

OFFICE PHONE EMAIL

SPECIALIST

TYPE

OFFICE PHONE EMAIL

SPECIALIST

TYPE

OFFICE PHONE EMAIL

OTHER

OFFICE PHONE EMAIL

Important Documents

Be sure to store documents in a safe location, and make copies as appropriate. Consult your financial representative and attorney as you determine what documents should be kept where. You may want to consider digital storage, but be sure to examine cybersecurity of sites and share your password with loved ones.

WILL	LAST REVIEWED	LOCATED
TRUSTS	LAST REVIEWED	LOCATED
POWER OF ATTORNEY	LAST REVIEWED	LOCATED
HEALTH CARE PROXY	LAST REVIEWED	LOCATED
ORGAN DONATION	LAST REVIEWED	LOCATED
LIVING WILL/MEDICAL DIRECTIVE	LAST REVIEWED	LOCATED
LIFE INSURANCE POLICIES	LAST REVIEWED	LOCATED
LONG-TERM CARE INSURANCE POLICIES	LAST REVIEWED	LOCATED
OTHER INSURANCE POLICIES	LAST REVIEWED	LOCATED
FUNERAL ARRANGEMENTS	LAST REVIEWED	LOCATED
REAL ESTATE DEEDS	LAST REVIEWED	LOCATED
FINANCIAL RECORDS	LAST REVIEWED	LOCATED
OTHER DOCUMENTS	LAST REVIEWED	LOCATED
OTHER DOCUMENTS	LAST REVIEWED	LOCATED

Additional Resources

Interested in learning more? These resources can help:

Medicare.gov

The official U.S. Government site for Medicare.

Eldercare.gov

A public service of the U.S. Administration on Aging connecting you to services for older adults and their families.

AARP.org

AARP is a nonprofit, nonpartisan organization that empowers people to choose how they live as they age.

State Health Insurance Programs (SHIPtcenter.org/)

SHIPs provide free, in-depth, one-on-one benefits counseling and assistance to Medicare beneficiaries, their families, friends, and caregivers.

Benefitscheckup.org

The BenefitsCheckUp® is a free service of the National Council on Aging.

SocialSecurity.gov

Learn more about Social Security retirement, disability, and survivors' benefits.

Annualcreditreport.com

Provides free credit reports every 12 months from each of the 3 credit bureaus.

i.fidelity.com



Information provided in this document is for informational and educational purposes only. To the extent any investment information in this material is deemed to be a recommendation, it is not meant to be impartial investment advice or advice in a fiduciary capacity and is not intended to be used as a primary basis for you or your client's investment decisions. Fidelity, and its representatives may have a conflict of interest in the products or services mentioned in this material because they have a financial interest in, and receive compensation, directly or indirectly, in connection with the management, distribution and/or servicing of these products or services including Fidelity funds, certain third-party funds and products, and certain investment services.

For investor use.

Not NCUA or NCUSIF insured. May lose value. No credit union guarantee.

The information contained herein is general in nature, is provided for informational purposes only, and should not be construed as legal or tax advice. Fidelity does not provide legal or tax advice. Fidelity cannot guarantee that such information is accurate, complete, or timely. Laws of a particular state or laws that may be applicable to a particular situation may have an impact on the applicability, accuracy, or completeness of such information. Federal and state laws and regulations are complex and are subject to change. Changes in such laws and regulations may have a material impact on pre- and/or after-tax investment results. Fidelity makes no warranties with regard to such information or results obtained by its use. Fidelity disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Always consult an attorney or tax professional regarding your specific legal or tax situation.

About Fidelity's Early Retiree Research: Unless otherwise noted, data represents insights from Fidelity Investments' survey on Bridging the Gap to Medicare. The online survey was conducted among a random sample of 1,003 adults between the ages of 50 and 64 who had retired in the past three years. The survey was fielded in November 2017 by Greenwald and Associates Inc., an independent third-party research firm. The results of this survey may not be representative of all adults meeting the same criteria as those surveyed for this study.

Fidelity-sponsored HSA Survey, conducted by GfK Public Affairs & Corporate Communications, February 2013. The HSA survey was conducted by GfK Public Affairs & Corporate Communications from February 4 to 20, 2013. The study was conducted among a nationally representative sample of 1,836 U.S. adults ages 25–64 with a household income of \$25,000 or more. Respondents also have primary or shared responsibility for household financial decisions and receive health care benefits through their own or their spouse's employer. Nearly half (48%) of the pre-retirees aged 55–64 surveyed estimated they would need only \$50,000 for health care expenses in retirement.

Fidelity Investments Retirement Savings Assessment Survey, a national online survey of 3,182 working households earning at least \$20,000 annually with respondents age 25 to 74, from September 14 through October 3, 2017. All respondents expect to retire at some point and have already started saving for retirement. Data collection was completed by GfK Public Affairs and Corporate Communication using GfK's KnowledgePanel®, a nationally representative online panel.

The 2020 Fidelity Retiree Health Care Cost Estimate is based on a hypothetical couple retiring in 2020, 65-years-old, with life expectancies that align with the 50% mortality age based on the Society of Actuaries RP-2014 Mortality Table projected with Mortality Improvement Scale MP-2017 as of 2018. Actual assets needed may be more or less depending on actual health status, area of residence, and longevity. Estimate is net of taxes. The Fidelity Retiree Health Care Cost Estimate assumes individuals do not have employer-provided retiree health care coverage, but do qualify for the federal government's insurance program, Original Medicare. The calculation takes into account cost-sharing provisions (such as deductibles and coinsurance) associated with Medicare Part A and Part B (inpatient and outpatient medical insurance). It also considers Medicare Part D (prescription drug coverage) premiums and out-of-pocket costs, as well as certain services excluded by Original Medicare. The estimate does not include other health-related expenses, such as over-the-counter medications, most dental services and long-term care.

Third-party trademarks and service marks are the property of their respective owners. All other trademarks and service marks are the property of FMR LLC or an affiliated company.

Fidelity Institutional Asset Management® (FIAM®) provides registered investment products via Fidelity Distributors Company LLC and institutional asset management services through FIAM LLC or Fidelity Institutional Asset Management Trust Company.

Fidelity Clearing & Custody Solutions® provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.

Before investing, consider the funds' investment objectives, risks, charges, and expenses. Contact your investment professional or visit i.fidelity.com for a prospectus or, if available, a summary prospectus containing this information. Read it carefully.