



## Legal Documents

As caregivers, we fill out *a lot* of forms. There are a few forms that are particularly important. As with all of Our Turn 2 Care's documents, the information listed here is subject to change according to legislation and other information we receive. Please check back periodically and stay tuned to our social media pages for updates!



## Definitions of Terms

### A

#### Advance Directive

Advance directives are legal documents that allow you to spell out your decisions about [end-of-life](#) care ahead of time. They give you a way to tell your wishes to family, friends, and healthcare professionals and to avoid confusion later on.<sup>1</sup>

Each state in the U.S. has its own Advance Directive form. Please select your form from the dropdown menu:

### B

#### Birth Certificate

Your birth certificate is one of your fundamental identifying documents. It's used as a reference point for acquiring many other forms of ID.<sup>2</sup>

### C

#### Citizen Papers

##### Born in the United States...

Your birth certificate provides proof of citizenship. If you need a copy of your birth certificate, contact the Bureau of Vital Statistics in the State in which you were born.

##### Born Outside of the United States...

The citizenship of someone born outside of the United States, as the child of a U.S. citizen parent, could vary depending on the law in effect when the birth took place. In most cases citizens born outside the U.S. requires a combination of evidence showing at least one parent being a U.S. citizen when the child was born and having lived in the United States or its possessions for a period of time.

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<sup>1</sup> Source: [MedlinePlus.gov](http://MedlinePlus.gov)

<sup>2</sup> Source: [DMV.org](http://DMV.org)



## D

### Death Certificate

The only legal proof that someone has died. The State uses it to stop social security payments, pensions and other benefits. Families use it to settle their affairs.<sup>3</sup>

### Divorce Papers

Copies of the divorce records are held by the Clerk of the Superior Court in the county where the divorce was granted. This is relevant as to the spouse's legal involvement in the person's care and estate decisions.

### Driver's License

A license issued under governmental authority that permits the holder to operate a motor vehicle. When an adult is no longer able to drive due to medical reasons, they may choose to surrender their license.<sup>4 5</sup>

### Durable Power of Attorney (DPOA)

A durable power of attorney for finances allows the patient to choose another person as their agent, and give that person access to the patient's money and other assets. DPOA gives them the authority to make financial decisions on patient's behalf if the patient become incapacitated (considered unable to make decisions for themselves due to physical or mental reasons). Some examples of the powers you can give your agent are the powers to:

- Authorize payment of bills;
- Run patient's business;
- File patient's taxes;
- Withdraw money from patient's checking or savings account;
- Control patient's investments;
- Sell patient's home;
- Apply for insurance benefits on patient's behalf.<sup>6</sup>

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<sup>3</sup> Source: [PBS.org](https://www.pbs.org)

<sup>4</sup> Source: [Merriam-Webster.com](https://www.merriam-webster.com)

<sup>5</sup> Source: [DMV.org](https://www.dmv.org)

<sup>6</sup> Source: [HRC.org](https://www.hrc.org)



E

F

G

H

## Healthcare Power of Attorney (HPOA)

A Healthcare Power of Attorney (also referred to as Medical Power of Attorney) appoints someone to make healthcare decisions – and not just decisions regarding life-support treatments – on someone’s behalf. The appointed healthcare agent (also called an attorney-in-fact or proxy) becomes the patient’s spokesperson and advocate on a range of medical treatments the patient sets out in the document, but only when the patient can’t communicate on their own. It is different from a regular durable power of attorney, which typically covers only financial matters.<sup>7</sup>

I

## Insurance Policies

- Life
  - After the patient passes away, the family (or other specified individuals) can use the funds to cover funeral costs, mortgage payments, and other expenses.
  - There are two main types of life insurance:
    - Term
      - The easiest to understand and has the lowest prices.
    - Permanent
      - More complex and tends to cost more than term, but it offers additional benefits. Whole life is the most well-known and simplest form of permanent life insurance.<sup>8</sup>
- Disability
  - A plan that provides for periodic payments of benefits when a disabled insured is unable to work.<sup>9</sup>

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<sup>7</sup> Source: [AARP.org](http://AARP.org)

<sup>8</sup> Source: [NerdWallet.com](http://NerdWallet.com)

<sup>9</sup> Source: [NAHU.org](http://NAHU.org)



- Long-Term Care
  - Designed to pay for long-term services and supports persons, including personal care in a variety of settings such as the home, a community organization, or other facility.<sup>10</sup>

J

K

L

## Letter of Instruction

Tells family, friends, or agents what the loved one wants done for a funeral or memorial service. It might include names and phone numbers of special people to tell that your loved one has died. You could include instructions about the type of service you want, who should officiate (or lead), who you want as pallbearers, or what songs should be sung.

## Living Will

A written, legal document that spells out medical treatments you would and would not want to be used to keep you alive, as well as other decisions such as pain management or organ donation.<sup>11</sup>

M

## Marriage Certificate

A legal document recognizing a marriage. A spouse is considered next of kin (unless MPOA states someone else), so it is important to have a certificate as proof, allowing spouse to make decisions. If you do not have an official copy of the marriage license, you can get one (along with other vital records) at your local county or state [Department of Health Vital Records](#).<sup>12</sup>

## Medical Power of Attorney (MPOA)

See [Healthcare Power of Attorney](#)

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<sup>10</sup> Source: [LongTermCare.gov](#)

<sup>11</sup> Source: [MayoClinic.org](#)

<sup>12</sup> Source: [USA.gov](#)



## Military Records

### Report of Separation:

Also referred to as DD Form 214, Certificate of Release or Discharge from Active Duty. Issued when a service member performs active duty or at least 90 consecutive days of active duty training. Contains information normally needed to verify military service for benefits, retirement, employment and membership in veterans' organizations, and may include service member's:

- Date and place of entry into active duty
- Home address at time of entry
- Date and place of release from active duty
- Home address after separation
- Last duty assignment and rank
- Military job specialty
- Military education
- Decorations, medals, badges, citations and campaign awards received
- Total creditable service
- Foreign service credited
- Separation information (date and type of separation, character of service, authority and reason for separation and separation and reenlistment eligibility codes)<sup>13</sup>

N

O

## Organ Donor Card

A card letting you know your loved one has registered to be an organ donor. This card may be a separate card (like the one pictured here) or it may be indicated on your loved one's driver's license or official government I.D.<sup>14</sup>

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<sup>13</sup> Source: [Archive.gov](https://www.archive.gov)

<sup>14</sup> Source: [OrganTransplants.org](https://www.organtransplants.org)





Q

R

S

## Safety Deposit Boxes

A miniature vault you can rent to store jewelry, family heirlooms, documents and other things you care about. They're a good way to keep your valuables protected. Be sure to find out if your loved one has a safety deposit box at their bank; if so, you will need the following:

- The address of the bank branch where the box is located.
- The box number.
- The key.
- A list of what's in the box.<sup>17</sup>

T

## Trust

A trust is a relationship where a designated holds the title to property, or an obligation to keep or use the property for the benefit of a loved one. Trust laws vary by state.<sup>18</sup>

U

V

W

## Will

A will is simply a legal document in which your loved one (the testator) chooses a person who will manage their estate after you die. Your estate can include big, expensive things (like a second home) or small items, like photographs. The person named in the will to manage your estate is called the executor because he or she executes your stated wishes.<sup>19</sup>

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<sup>17</sup> Source: [NerdWallet.com](http://NerdWallet.com)

<sup>18</sup> Source: [IRS.gov](http://IRS.gov)

<sup>19</sup> Source: [AARP.org](http://AARP.org)



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Y

Z