

# Health-care Record

**AGF** SOUND CHOICES

## Health-care Planning

Just as it's important to keep a record of your financial plan, it's equally important to keep a record of key information surrounding your health care as you age. Complete this record and provide it to a trusted family member or caregiver, notifying them of any changes.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Phone number(s)

\_\_\_\_\_  
Online accounts number(s) and passwords(s)

\_\_\_\_\_  
Email(s)/password(s)

\_\_\_\_\_  
Facebook/LinkedIn etc. password

\_\_\_\_\_  
Where are their important documents stored and who has a copy ?

\_\_\_\_\_  
Emergency contact(s) information:

\_\_\_\_\_  
Doctor(s) contact information:

\_\_\_\_\_  
General Practitioner contact information:

\_\_\_\_\_  
Specialist(s) Physio etc. contact information:

\_\_\_\_\_  
Dentist contact information:

**Illnesses/conditions:**

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**Medications/Pharmacist:**

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**Allergies:**

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**Health care facility(ies) contact information:**

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**Home care service(s) contact information:**

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**Financial advisor(s) contact information:**

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**Financial account(s)/Banking contact information:**

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**Lawyer contact information:**

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**Accountant contact information:**

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Please note this worksheet is provided as a general source of information only as a guideline, it is not meant to be comprehensive, and does not provide advisors or individuals with any opinion regarding the implementation of this worksheet. Every effort has been made to ensure accuracy at the time of this publication, however accuracy cannot be guaranteed. AGF Management Limited takes no responsibility for any reliance on the information contained herein.

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