

POA & Caregiver Quick Start Checklist

KNOW WHERE YOU STAND

- Do you know if the Power of Attorney is already in place?
- Do you know where those documents are located?
- Do you know who is legally authorized to make decisions if needed?

LEGAL & DOCUMENTS

- Power of Attorney (Financial)
- Health Care Directive / Medical POA
- Will or Trust documents
- Copies of ID, Social Security card, and insurance cards

FINANCIAL AWARENESS

- List of bank accounts and institutions
- Access to online accounts (securely documented)
- Monthly bills and recurring expenses identified
- Understanding of income sources (Social Security, pensions like PERA, etc.)

MEDICAL & CARE NEEDS

- List of medications and providers
- Primary care physician and specialists identified
- Insurance information accessible
- Emergency contacts documented

IMMEDIATE RISKS TO WATCH FOR

- Recent scams or fraud concerns
- Missed bills or unusual account activity
- Changes in memory, mobility, or behavior
- Lack of clear decision-maker in place

IF SOMETHING HAPPENED TOMORROW...

Ask yourself honestly:

- Would I know what to do first?
- Would I have access to what I need?
- Would I feel confident making decisions?

FINAL THOUGHTS

Most families don't realize what's missing until they're in the middle of it.

Taking a few steps now can bring clarity, reduce stress, and help you feel more prepared for whatever comes next.

This checklist was created from real-life caregiving experience to help bring clarity during overwhelming moments.

If this helped you, the full Caregiver System walks you through every step in detail.

(No Pressure. Just a path.)