

# Aging parents checklist

## ► Living arrangements

- ☐ Discuss living options
- ☐ Come to an agreed upon housing arrangement
- ☐ Make home updates for safety
- ☐ Go over mortgage or any outstanding home debts
- ☐ Enroll in long-term care insurance, if needed

## ► Caregiving

- ☐ Go over daily and routine health needs
- ☐ Meet with primary care physicians
- ☐ Discuss caregiving options
- ☐ Create a caregiving plan
- ☐ Outline caregiving needs for any pets

## ► Finances

- ☐ Create a list of open accounts
- ☐ Review account titles
- ☐ Ensure beneficiaries are up-to-date
- ☐ Pay down debts
- ☐ Streamline bill payments

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## ► Legalities

- ☐ Review will
- ☐ Update estate plan
- ☐ Locate important documents
- ☐ Make a list of important passwords
- ☐ Create health care power of attorney
- ☐ Create financial power of attorney

## ► Health and medical support

- ☐ Go over health and medical needs
- ☐ Discuss any health conditions
- ☐ Gather their primary care physicians' contact information
- ☐ Schedule out routine check-ups
- ☐ Locate the nearest hospital

## ► Insurance

- ☐ List out all insurance policies
- ☐ Review insurance policy information
- ☐ Gather contact information for insurance advisors
- ☐ Update policies as needed

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## ► Important documents

- ☐ Living will
- ☐ Health care power of attorney
- ☐ Financial power of attorney
- ☐ Estate plan
- ☐ Insurance cards
- ☐ Life insurance policy
- ☐ End-of-life instructions
- ☐ Birth certificate
- ☐ Social security card
- ☐ List of online usernames and passwords
- ☐ List of safe deposit boxes and the location of any keys