

ELDER CARE CHECKLIST

The importance of Elder Care Planning cannot be overstated. Many individuals and families are unprepared for issues that arise with older parents - or even themselves. Here is a brief checklist of records that you should have readily available for yourself and your parents.

Financial Checklist	Health Care Checklist	Parent's Advisors	Basics
Wills	Living Will	Financial Advisor	Driver's License or State Issued ID (<i>Copies</i>)
Trusts	Health Care Power of Attorney	Lawyer	Insurance Cards (<i>Copies</i>)
Durable Financial Power of Attorney	DNR (Do Not Resuscitate Order)	Accountant or Tax Advisor	Medicare, VA and Medicaid Cards (<i>Copies</i>)
Life Insurance and Annuities	HIPAA Release Form	Religious Council	Phone Numbers of Friends
Investments	Health Insurance Policies	Doctors	Safe Deposit Box (<i>Contents</i>)
Bank Accounts	Long-term Care Insurance		Marriage Records (<i>Copy of Certificate</i>)
Charge Cards	List of Medications		Military Records (<i>Copy of Records</i>)
Burial Plots and Pre-paid Funerals	End of Life Wishes (<i>Discussion</i>)		Birth Certificate and Death Certificates (<i>Copies</i>)