



### **Caregiver Checklist – Elder Care & Estate Planning**

#### **For my loved one**

- ☐ POA Property completed
- ☐ POA Healthcare completed
- ☐ Discussion about wishes
- ☐ Discussion with doctors about wishes
- ☐ All important papers secured – birth/marriage/divorce/death certificates, DD214, Medicare & Social Security Cards, Insurance Cards, Credit Cards
- ☐ Freeze credit - information via [www.ftc.gov](http://www.ftc.gov)

#### **For me**

- ☐ **BACK UP PLAN** for care for my loved one & system in place to enact it
- ☐ POAs & Will completed/updated – all named are able to serve
- ☐ Copies of POAs given to agents named in the documents
- ☐ Plans for finances and care discussed with my agents named in my POAs
- ☐ Own & Owe List
- ☐ Password List including phone/computer code, house/door codes, other online account information
- ☐ All important papers secured and location information given to agents
- ☐ Consult with Financial Adviser and/or Attorney before/when it comes time to liquidate assets to pay for care
- ☐ Last Will & Testament – disinherit any who receive benefits like Medicaid/VA

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