

# CARING FOR AN AGING PARENT CHECKLIST

GENERAL INFORMATION	Y	N	N/A
<b>Has personal information been gathered?</b>			
Name, phone number, and address of parent			
Parent's date of birth			
Parent's Social Security number			
Name, phone number, and address of attorney, physician, geriatric care manager, or other advisor			
Parent's legal state of residence			
Parent's health status			
Parent's marital status			
Family members available for support			
<b>Has your parent's financial situation been assessed?</b>			
Income from pension, Social Security, employment, or other source			
Expenses			
Assets			
Liabilities			
RISK MANAGEMENT PLANNING	Y	N	N/A
<b>Does your parent have long-term care insurance?</b>			
<b>Does your parent have adequate health insurance?</b>			
Medicare			
Medigap			
<b>Does your parent have an adequate amount of other types of insurance?</b>			
Homeowners insurance			
Auto insurance			
Umbrella liability insurance			
ESTATE PLANNING	Y	N	N/A
Durable power of attorney			
Living will			
Health-care proxy			
Revocable living trust			
Is the trustee of the trust and durable power of attorney the same person or are they different?			
<b>Should an estate planning attorney who specializes in elder law be consulted?</b>			
<b>Has your parent prepared letters of instruction?</b>			
<b>If your parent's estate is likely to be subject to estate tax, have ways to minimize estate taxes been considered?</b>			
<b>Has your parent made funeral arrangements?</b>			
<b>Has a family meeting taken place?</b>			

<b>HOUSING ISSUES</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
Have contingency plans been made in case a housing change is necessary in the future?			
Have your parent's wishes regarding housing been considered?			
Have your wishes regarding housing been considered?			
Does your parent currently need nursing home care?			
Have alternative housing options been explored?			
Remaining in home (possibly with in-home care)			
Moving in with relative			
Assisted living			
Continuing care retirement communities			
Senior apartments			
Nursing home			
Have adult day-care options been discussed and evaluated?			
<b>FINANCIAL ISSUES</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
Does your parent have enough money from income and savings to sustain his or her lifestyle?			
Is his or her asset allocation still appropriate?			
Is your parent able to make appropriate financial decisions?			
Should the financial power of attorney and or trustee be involved in assisting your parent with cash flow needs?			
Does Medicaid planning need to be considered?			
Will your parent be dependent on you for financial support?			
If so, have your financial needs been considered?			
Have distribution strategies been discussed and evaluated?			
<b>OTHER</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
Bank account records (statements and passbooks)			
Stock certificates, bonds, and other investment records			
Credit card statements			
Mortgage, insurance, utility bills			
Retirement plan statements			
Income tax returns for the last three years			
Real estate deeds, mortgages, and other property ownership records			
Vehicle titles			
Business agreements			
Insurance policies			
Will, trust, advanced directives, letters of instruction, and other documents			
Location of and key to safe-deposit box			
Birth certificate and marriage or divorce certificates			
Citizenship records			
Passport			
Military records			
If your parent has an interest in a business, have arrangements been made to continue or dispose of the interest in the event of incapacity or death?			