



ELDER CARE TRANSITION CHECKLIST

RECORDS:

① Photocopy and store in a secure place:

Social Security Card	Medicare, Medicaid, or other Insurance Cards	Mortgage Records
Passport/Citizenship	Life Insurance Policies	General Power of Attorney
Papers Birth Certificate	Disability Insurance Policies	Military Records
Driver's License/ Organ Donor Card	Long Term Care Insurance	

② List locations of original documents:

All documents listed above	Last Will and Testament
Marriage Certificate (if applicable)	Trust Documentation
Death Certificate of spouse (if applicable)	Health Care Directive
Divorce Papers (if applicable)	Do Not Resuscitate (DNR) Order

③ Create a list of important contacts:

Immediate Family Members	Financial Planner	Broker
Doctors	Accountant	Beneficiaries
Clergy Members	Banks	
Attorney	Insurance Agents	

④ Create a list of all passwords, access codes, and PINS.





ELDER CARE TRANSITION CHECKLIST

FINANCES:

① Gather information on the following:

All bank account information. *Credit cards, debit cards, savings, and checking accounts.*

Social Security Information.

Sources of Income. *Deferred compensation, pension plans, 401(k), 403(b), IRA, etc.*

Investment Accounts.

Any outstanding loans. *Student loans, credit card, mortgages, auto, personal, etc..*

Federal and state tax returns. *Include the past 3-5 years.*

All Residences. *Addresses and mortgages.*

All automobiles. *Include make, model, tag, title, loans, insurance companies, etc.*

Recreational vehicles.

Valuables and personal assets. *Art, jewelry, furs, etc.*

Appraisals of personal property.

Any rental agreements or business contracts.

Any insurance policies. *Include provider, type, coverage, etc.*

Charitable gifts and donations.

② Designate a Financial Custodian: *Family, friend, financial advisor.*

③ Simplify finances:

Limit Number of Accounts. *Target: One checking, saving, IRA, ROTH, and taxable account.*

Automate bill payments.

Hire Financial Planner.

④ Other general tasks:

Verify asset allocation. *With financial planner and financial custodian.*

Construct a budget. *Include home maintenance costs, health care costs, and loans.*

Determine financial review frequency. *Financial custodian - monitoring finances.*

Determine financial turnover period. *When the financial custodian will take control of finances.*

Collect combinations and key locations for safes and safety deposit boxes.





ELDER CARE TRANSITION CHECKLIST

HEALTH CARE:

① List the following:

Current health issues. *Allergies, diseases, pre-existing conditions, tests, procedures.*

Hereditary health issues in past family members.

Current prescriptions and drugs. *Costs, dosages, and pharmacy information.*

Current hospitals, practices, and doctors. *Primary, specialists, dentists, therapists, psychiatrists, finances.*

ESTATE PLANNING:

① Tasks to complete:

Review current documents. *Will, trusts, health care directive, power of attorney.*

Establish needed documents.

Discuss roles with executors, trustees, and beneficiaries.

Share passwords, access codes, and PINS with designated parties.

Determine asset distribution.

Establish funeral and burial/cremation instructions.

HOME MAINTENANCE:

① Tasks to complete:

Make copies of house keys for designated parties.

List information on home repairs, housekeeping, lawn care, etc.

Gather information on garbage pickup.

Designate pet care takers.

Discuss installing disability accessible features. *Address bathrooms, stairs, etc.*





ELDER CARE TRANSITION CHECKLIST

LIFESTYLE TRANSITION:

① Discuss possible future living arrangements. *In-home care, moving in with a family member, assisted living facility, adult day care, nursing home.*

② If staying in current residence, consider the following:

How close are grocery stores and restaurants?

Social Interaction availability.

How close is basic medical care?

Technology usage to monitor wellbeing.

Safety precautions.

③ Determine appropriate transportation methods:

Errand runner

Caregiver

Bus/shuttle system

Uber and taxis

④ Determine conditions for lifestyle transition:

Safety issues

Transportation

Problems with upkeep

Impeded social interactions

