



Elder Parents Checklist

Communication

- Have the conversation early so you have time to make or change plans based on your parents' needs.
- Create a comfortable and open environment for the conversation.
- Take notes so you remember what was discussed and keep track of your next steps.
- Keep a list of all their passwords for accounts such as computer, email, phone, and cable.

Health and Medical Care

- Designate a healthcare proxy who can speak with your loved ones' doctors and make decisions.
- Keep an up-to-date list of all their medications, including over-the-counter, supplements, and vitamins.
- Keep a list of their doctors and specialists, including their contact information.
- Ensure they are taking medications as prescribed.
- Make a note of the closest urgent care facility and hospital.
- Get to know their primary care physicians.
- Help schedule upcoming appointments.
- Encourage your parent to write a living will and keep a copy on file.

Ensure Safe Living Arrangements

- Evaluate the safety of their home and make modifications if necessary.
- Review any mortgage or financial concerns about the home.
- Check in regularly, either in person, or by phone or video chat.
- Consider buying long-term care insurance.
- Develop an emergency plan and list of emergency contacts in case of a natural disaster or other emergency.

Create a Caregiving Plan

- Have a caregiving plan ready in case your loved ones need in-home care.
- Discuss changes to your parents' healthcare needs with their doctors.

- Research different caregiving options.
- Find out if your loved ones have any specific needs to maintain their health and happiness.

Social and Support Network

- Encourage your parents to stay socially engaged and participate in activities that bring them joy.
- Check if your parents have a support network in their local community.
- Keep the name and number of a neighbor who can regularly check on your loved ones.
- Create a schedule of friends and family who call or regularly video chat.
- Ensure your parents have access to reliable transportation when needed, especially if they don't drive.

Review Finances

- Find out what financial accounts are open and where they are held.
- Make a list of advisors' contact information.
- Ensure they are making informed decisions about retirement, investments, and insurance.
- Stay up to date on Social Security benefits.
- Check that beneficiary designations are current.
- Make sure your loved ones have a POA representative.
- Streamline bill paying by setting up automatic payments.
- Ensure they know how to avoid scams.

Gather Legal Documents

- Discuss important documents and where they are stored.
- Find out if your parents have a will and living will, and where they are located.
- Make sure their POA for finances and healthcare proxies are in order.
- Read through their estate plan/will to make sure beneficiaries and responsibilities are correct and up to date.

Review Insurance Plans

- Make a list of active insurance policies such as auto, home, health, long-term care, etc.
- Review homeowners, auto, and life insurance policies to ensure they are adequate and up to date.

- Review health insurance coverage regularly for any policy changes that need to be made as needs change.