

Future Planning Checklist

Be proactive to:

- Personalize one's care
- Begin the conversation with trusted family and/or friends
- Have confidence one's wishes are implemented▪

Plan for the future by identifying:

- Financial support to pay for home care, health care, home bills, etc.
- A back -up plan to check on home, care for pets, access to home, etc.

Compile these documents in a safe location before a lifestyle change occurs unexpectedly

Financial

<input type="checkbox"/>	Financial Power of Attorney (FPOA) (Representative to manage one's finances in the event one is unable)
<input type="checkbox"/>	Bank account statements (Joint account v. Transfer on Death designation)
<input type="checkbox"/>	Retirement account statements (Pension, 401K, IRA, etc.)
<input type="checkbox"/>	Tax returns
<input type="checkbox"/>	Social Security / Disability income statements
<input type="checkbox"/>	Stocks, bonds, certificates of deposit, brokerage account statements
<input type="checkbox"/>	Loans, debts, credit card statements
<input type="checkbox"/>	Deeds, mortgage papers
<input type="checkbox"/>	Vehicle title(s)
<input type="checkbox"/>	Life insurance policies
<input type="checkbox"/>	Veteran benefits
<input type="checkbox"/>	Partnership and corporate operating agreements
<input type="checkbox"/>	Trust documents
<input type="checkbox"/>	Listing of current bills and account numbers

Healthcare

<input type="checkbox"/>	Power of Attorney for Healthcare (POAHC) / Advanced Directive / Guardianship (Representative to make medical decisions on one's behalf if incapable)
<input type="checkbox"/>	Authorization to release health-care information
<input type="checkbox"/>	Name(s) of current doctors, specialists
<input type="checkbox"/>	Health insurance policy and statement
<input type="checkbox"/>	Insurance card (Medicare, Medicaid, other)
<input type="checkbox"/>	List of current medication
<input type="checkbox"/>	Health history
<input type="checkbox"/>	Long-term care insurance policy and statements

Estate Planning

<input type="checkbox"/>	Will
<input type="checkbox"/>	Trust
<input type="checkbox"/>	Life insurance policy
<input type="checkbox"/>	Passwords for online accounts
<input type="checkbox"/>	Safety deposit box information
<input type="checkbox"/>	Final disposition preferences (memorial/funeral arrangements)

