

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

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 vs. 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

(Over)



Healthcare

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

Estate Planning

- Will
- Trust
- Life insurance policy
- Passwords for online accounts
- Safety deposit box information
- Final disposition preferences (memorial/funeral arrangements)

