

Essential Aging Parent Document Checklist

LEGAL & FINANCIAL DOCUMENTS

- Durable Power of Attorney (Financial):** Designates a person to manage finances, pay bills, and handle tax issues if the parent is incapacitated.
- Last Will and Testament:** Outlines how assets, property, and investments should be distributed after death.
- Revocable Living Trust:** Optional tool to manage assets during life and avoid probate court later.
- Property Deeds & Vehicle Titles:** Physical proof of ownership.
- Account & Asset List:** A comprehensive list of bank accounts, investment accounts, retirement funds, and insurance policies (with logins/passwords).

MEDICAL & HEALTHCARE DOCUMENTS

- Healthcare Proxy / Medical Power of Attorney:** Names an agent to make medical decisions if the parent cannot speak for themselves.
- Advance Directive / Living Will:** Documents specific preferences for end-of-life care, such as ventilators or feeding tubes.
- HIPAA Authorization Form:** Grants doctors permission to share health information and updates with designated family members.
- DNR (Do Not Resuscitate) / POLST:** Medical orders regarding resuscitation and life-sustaining treatment.
- Medical Records List:** Up-to-date log of primary doctors, specialists, current medications, dosages, allergies, and active diagnoses.

VITAL PERSONAL RECORDS

- Identification:** Birth certificate, marriage certificate, social security card, and passport.
- Military Papers:** Discharge papers (DD-214) to claim veteran burial or health benefits.
- Financial History:** Tax returns from at least the last three years.

STORAGE & ACCESS QUICK LOG

Physical Location of Original Documents: _____

Digital Vault / Password Manager Name: _____

Primary Financial Power of Attorney: _____

Primary Medical Power of Attorney: _____

Date Last Reviewed/Updated: ____ / ____ / 20__