***Ten Step Checklist For Smart Retirees***

Reaching retirement age is maturity, and a different responsibility to loved ones. Every person needs a checklist to ensure that their new status includes preparing their families with essential information and paperwork.

* 1- Decide whom you want to communicate with about your future. Set a date and sit down together.
* 2- Have a signed, notarized durable power of attorney
* 3- Have a signed advance health care directive (You can get items 2 & 3 free on the internet)
* 4- Make a list of all bank accounts, passwords, hard drive backup, investment records, and financial planning you have done, with people to contact. Give written permission to your loved ones to talk with your lawyer, accountant, and financial planner.
* 5- Make a list of all insurance policies, including life, disability, health, property, earthquake and anything else you own that will protect your heirs.
* 6- Make a copy of your mortgage statement, any other loans, and debts, financial statements and bank statement. Keep in one place. Update quarterly these changes.
* 7- List your physicians, care providers, and medications. Give written permission for your loved ones to speak with your doctors.
* 8- Create or have on hand information about your wishes for burial or disposition of your remains.
* 9- Update your will and/or trust with a local attorney. Laws change and these need to be up to date in your state.
* 10- Have a family meeting to give items 2-9 to your loved ones and explain them.

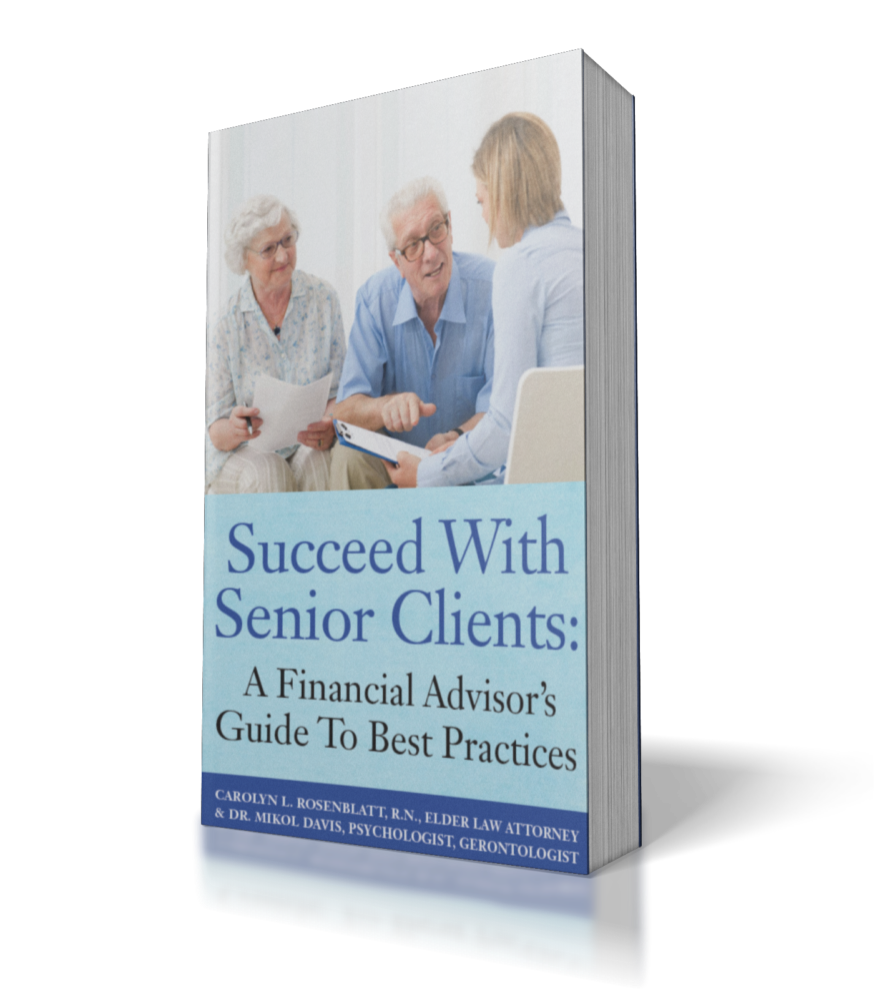
AgingInvestor.com was founded by Carolyn Rosenblatt, RN, elder law attorney and Dr. Mikol Davis, geriatric psychologist. We provide aging expertise to financial services professionals.

**Brief Bios of founders, AgingInvestor.com**

**Dr. Davis** has over 45 years of clinical experience in mental health. He frequently assesses capacity for decision making in aging adults. He creates many online courses and products to assist professionals and the public with understanding aging issues. He has extensive experience in treating anxiety and depression for persons of all ages with special focus on geriatrics. He helps financial professionals with difficult client conversations and communication issues with impaired clients. He volunteers as a settlement panelist for Marin County Courts in high conflict family matters. He is an active Rotarian. Dr. Davis and Ms. Rosenblatt share a passion for elder abuse prevention.

**Carolyn Rosenblatt** has over 45 years of experience in her combined professions of nursing and legal practice. Together with her partner and husband, geriatric psychologist Dr. Mikol Davis, she founded AgingParents.com, a resource for families, and AgingInvestor.com offering training about aging issues for professionals.

She is a consultant in aging and has been quoted in the Wall Street Journal, the New York Times, Reuters, On Wall Street, Next Avenue, Financial Advisor, and many other sources. Ms. Rosenblatt blogs at *Aging Parents*, on ***Forbes.com.*** She is the author of ***The Family Guide to Aging Parents,*** and the ABA's ***Working With Aging Clients: A Guide for Lawyers, Business and Financial Professionals***. She and Dr. Davis co-authored ***Succeed With Senior Clients, A Financial Advisor's Guide to Best Practices*** (2016). [CLICK HERE](http://www.aginginvestor.com/succeed) or on the **Book** to order your copy now!

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