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Help Aging Parents Checklist

Here are 10 things you need to do right away in preparing for managing aging parents. You need them for yourself too!

1. Decide who is best suited in your family to communicate with aging parents about their future. Set a date and sit down together. Talk about what your elders want and what you want.
2. Have a signed, notarized **durable power of attorney from aging parents**.
3. Have a signed **advance health care directive for aging parents**, also called power of attorney for healthcare. (Basic versions of DPOA and advanced healthcare directive are available on the internet if you need them immediately. A lawyer is not required but can be helpful.)
4. Make a list of all bank accounts, passwords, hard drive backup, investment records, and financial planning your parents have done with associated professionals to contact. Get written permission to talk with your elders' lawyer, accountant, and financial planner. If your aging parents are "out of it" these professionals can't talk to you without permission.
5. Make a list of all aging parents' insurance policies, including life, disability, long term care, health, property, earthquake, and anything else that will protect their heirs. A trusted person, like the one they appointed to be power of attorney, needs all this information.
6. Make a copy of their mortgage statement, any other loans, and debts, financial statements, and bank statements. Keep in one place. Update quarterly-these change. The POA should have all these records. When a loved one becomes incapacitated, you can pay the bills right away.
7. List your aging parents' physicians, care providers, and medications. If you don't have it, get written permission from your loved ones to speak with their doctors. A HIPAA release will allow communication with providers even if you are not the healthcare agent.
8. Have on hand information about their wishes for burial or disposition of their remains. Let family members know your aging parents' wishes.
9. Ask aging parents about the last time they updated their will and or trust with a local attorney. Laws change concerning inheritance. If no one has looked at these documents for years, it can be problematic. Outdated legal documents cause conflicts and legal battles.
10. Call a family meeting to give all stakeholder family members the essential information about plans for your aging parents' future, who will be in authority and what participation will be needed.

How you can benefit from [AgingParents.com's](http://AgingParents.com) services:

If you are feeling stuck, at an impasse with anyone in your family, stressed out or confused about choices that must be made, we can reduce that stress. Often knowledge is power, and we can help you so you can be effective. Sometimes you just need some support to be confident that you're doing the right thing. We provide that. Finally, when a family fight gets out of control, it can lead to lawsuits and destruction of all relationships. We can help families prevent disputes from escalating. In all, we can save you time, money, and aggravation.

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