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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.