

Forget-me-not



Henri's Helping Hand, LLC

Priority Checklist for Caregivers

When caring for a loved one, having essential documents and information organized can bring clarity and peace of mind. This checklist is designed to help caregivers prepare for the practical and legal aspects of care – from financial planning to healthcare decisions.

Taking the time to gather and safely store these items ensures that you and your loved one are protected, informed, and ready to navigate important decisions with confidence.

- ☐ Draft a Last Will and Testament.
- ☐ Complete an Advance Directive/Living Will, including your wishes and names with contact information of your chosen Health Care Proxy and alternates.
- ☐ Complete a POLST document.
- ☐ Complete at least three original copies of Financial and Healthcare Power of Attorney documents, as well as Mental Health Power of Attorney document, as applicable.
- ☐ Know the location of any vehicle titles, as applicable.
- ☐ Make a complete list of all bank accounts, including account numbers and the financial institutions where each account is held.
- ☐ Make a list of any and all insurance policies, including policy numbers.
This includes life insurance policies.
- ☐ Make a list of all credit cards, including account numbers.
- ☐ Make a list of all investment accounts, stocks, bonds, IRAs, etc.
- ☐ Make a list of all business interests, investments and accounts.
- ☐ Make a list of all utility companies where you have accounts.
- ☐ Keep copies of all current health insurance cards.
- ☐ Keep copies of all income tax documents.
- ☐ Know the location of personal identification information, such as driver's license and passport.
- ☐ Know the location of any property deeds, storage units.
- ☐ Know the location of any firearms or weapons that might be in the residence.
- ☐ Keep originals of all important documents in a safe, secure location.
- ☐ Ensure that someone you trust, knows the location of any and all important documents, including the originals.
- ☐ If important information is computerized, ensure someone you trust can access that information.