



PLANNING CHECKLIST  
FOR CAREGIVERS

GETTING ORGANIZED

*Financial Accounts*

|  |  |
|--|--|
|  | Bank Accounts (including Safe Deposit Boxes) |
|  | Investment Accounts                          |
|  | Retirement Accounts                          |
|  | Annuities                                    |
|  | Credit Cards                                 |
|  | Life Insurance Policies                      |

*Sources of Income*

|  |                 |
|--|-----------------|
|  | Social Security |
|  | Pensions        |
|  | Annuities       |
|  | Rental / Lease  |
|  | Other           |

*Expenses*

|  |   |
|--|---|
|  | Monthly or recurring bills (Power, Gas, Water, Cable, Phone, Garbage, etc.) |
|  | Insurance Premiums (Life, Home, Auto, etc.)                                 |
|  | Taxes (Income, Property, etc.)  |
|  | Outstanding Liabilities (Mortgage, Home Equity, Auto Loan, etc.)            |

*Other Important Documents*

|  |  |
|--|--|
|  | Social Security Card   |
|  | Medicare paperwork   |
|  | VA or other Government Benefits  |
|  | Statement of Ownership (Property Deeds, Vehicle Titles, etc.)                      |
|  | Digital Assets (Usernames and Passwords for online accounts)                       |
|  | Contact Information for professionals ( Lawyer, Accountant, and Financial Advisor) |

## DISCUSSING PLANNING OPTIONS

### *Family / Caregiver Discussions*

|  |  |
|--|--|
|  | Who should be the primary caregiver?                           |
|  | Who should be Power of Attorney?                               |
|  | How should caregiver responsibilities be divided?              |
|  | Care / Treatment Options                                       |
|  | Discuss the care wishes of the person with dementia            |
|  | Discuss the estate planning wishes of the person with dementia |

### *Financial Planner Discussions*

|  |   |
|--|---|
|  | Review ways to pay for different care options                         |
|  | Review account / insurance beneficiaries                              |
|  | Review current estate plans   |
|  | Review investment portfolios with the need for long-term care in mind |
|  | Review portfolio distribution strategy                                |
|  | Review possible tax deductions  |

## REVIEWING LEGAL OPTIONS

### *Legal Documents*

|  |                           |
|--|---------------------------|
|  | Durable Power of Attorney |
|  | Medical Power of Attorney |
|  | Living Will               |
|  | Standard Will             |
|  | Revocable Living Trust    |

*Notes:*