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Use this checklist to stay ahead and feel confident you're prepared before a health crisis or emergency ever arises.

This checklist is for: _____

CRUCIAL LEGAL DOCUMENTS

- ☐ General Durable Power of Attorney (for finances)
- ☐ Health Care Power of Attorney (for medical decisions)
- ☐ Living Will (also known as the Advance Directive)
- ☐ HIPAA Authorization (to release medical information to named individuals)
- ☐ Revocable Living Trust (if applicable)
- ☐ Last Will and Testament

ORGANIZATION

- ☐ Location of all legal documents is known to key decision-makers
- ☐ List of financial accounts, insurance, and benefits is accessible to financial decision-makers
- ☐ Family knows who is in charge of which decisions

LONG-TERM CARE PLANNING

- ☐ Family has reviewed options for nursing home and assisted living care
- ☐ Medicaid eligibility and asset protection options have been discussed with a professional
- ☐ VA Aid & Attendance has been considered (if veteran or surviving spouse)

AFTER-DEATH PREPARATION

- ☐ Executor or Trustee knows their role and has access to guidance
- ☐ Funeral wishes are documented and known to the family
- ☐ Estate is structured to avoid probate and other unnecessary court involvement



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