



## Taking Care of Mom and Dad

takingcareofmomanddad.org

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# Legal Documents Checklist

These documents must be signed while your parent still has mental capacity. Do not wait.

### THE THREE MOST IMPORTANT DOCUMENTS

- Financial Power of Attorney — signed and notarized  
*Lets you manage bank accounts, pay bills, and handle property.*

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- Healthcare Power of Attorney / Healthcare Proxy  
*Lets you make medical decisions if your parent cannot.*

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- Living Will / Advance Directive  
*Records your parent's wishes for end-of-life care in writing.*

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### ADDITIONAL LEGAL DOCUMENTS

- POLST form — completed and on file with their doctor  
*A medical order that tells emergency responders exactly what to do.*

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- Will or Trust — reviewed in the last 5 years

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- Beneficiaries up to date on bank accounts and life insurance  
*These pass outside of a will — check them separately.*

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- You know where all documents are stored  
*Tell at least one other trusted family member.*

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### HEALTHCARE AND FINANCIAL ACCESS

- Doctor has a signed HIPAA release so they can speak with you freely  
*Without this, doctors are limited in what they can share.*

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- You have access to their Medicare and insurance cards

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- You know the login for their Medicare account at medicare.gov

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- You know which bank accounts and investments exist

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- You know the location of the original will

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### INSURANCE AND BENEFITS

- Long-term care insurance policy reviewed — know what triggers benefits  
*Many families forget they have this until it is too late to claim.*

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Veterans benefits explored if your parent served in the military  
*The VA Aid & Attendance pension can provide significant help.*

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Medicare coverage reviewed for current care needs

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Medicaid eligibility explored if finances are limited

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*This checklist is for informational purposes only and is not legal advice. Laws vary by state. Consult an elder law attorney for guidance.  
takingcareofmomanddad.org — Free resources for family caregivers*