



United We Age Essential Documents Checklist

For Elder and Caregivers



Health & Medical

- ☐ **Medical History:** List of conditions, allergies, medications.

Conversation Tip: Ask about past hospitalizations and surgeries.

- ☐ **Insurance Cards:** Medicare, Medicaid, supplemental insurance.

Conversation Tip: Understand coverage details and limitations.

- ☐ **Advance Directives:** Living will, healthcare proxy (durable power of attorney for healthcare).

Conversation Tip: Discuss their wishes for end-of-life care.

- ☐ **Physician Contact Information:** Names, phone numbers, addresses of doctors.

Conversation Tip: Inquire about preferred specialists.

Finances & Legal

- ☐ **Financial Accounts:** Bank accounts, investment accounts, retirement funds.

Conversation Tip: Identify key accounts and access information.

- ☐ **Legal Documents:** Will, trust, power of attorney (financial).

Conversation Tip: Determine who is authorized to manage their finances.

- ☐ **Property Deeds/Leases:** Documentation of home ownership or rental agreements.

Conversation Tip: Review property-related obligations.

- ☐ **Tax Returns:** Recent tax filings.

Conversation Tip: Understand their tax obligations.

Safety

- **Emergency Contacts:** List of people to notify in case of emergency.

Conversation Tip: Confirm contact information and relationships.

- **Medication List:** Comprehensive list of medications, dosages, and schedules.

Conversation Tip: Ensure accuracy and understanding of medication management.

- **Allergy Information:** List of allergies to medications, foods, or other substances.

Conversation Tip: Understand severity of reactions.

Daily Living & Emergency

- **Routine Information:** Daily schedules, preferred activities, dietary restrictions.

Conversation Tip: Learn about their daily life and preferences.

- **Emergency Plan:** Fire evacuation plan, disaster preparedness plan.

Conversation Tip: Discuss emergency procedures and meeting points.

- **Key Contacts:** Neighbors, friends, or family members who can provide support.

Conversation Tip: Identify their support network.

Digital & Other

- **Passwords:** List of important passwords for online accounts (stored securely).

Conversation Tip: Discuss online safety and security measures.

- **Important Documents Location:** Location of all essential documents (physical and digital).

Conversation Tip: Ensure easy access and organization.

- **Funeral Arrangements:** Pre-planned funeral arrangements, cemetery plot information.

Conversation Tip: Address end-of-life wishes with sensitivity.

This checklist is a starting point. Every individual's situation is unique, and additional documents or information may be necessary. It is important to have open and honest conversations to ensure the best possible care.

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